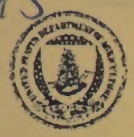


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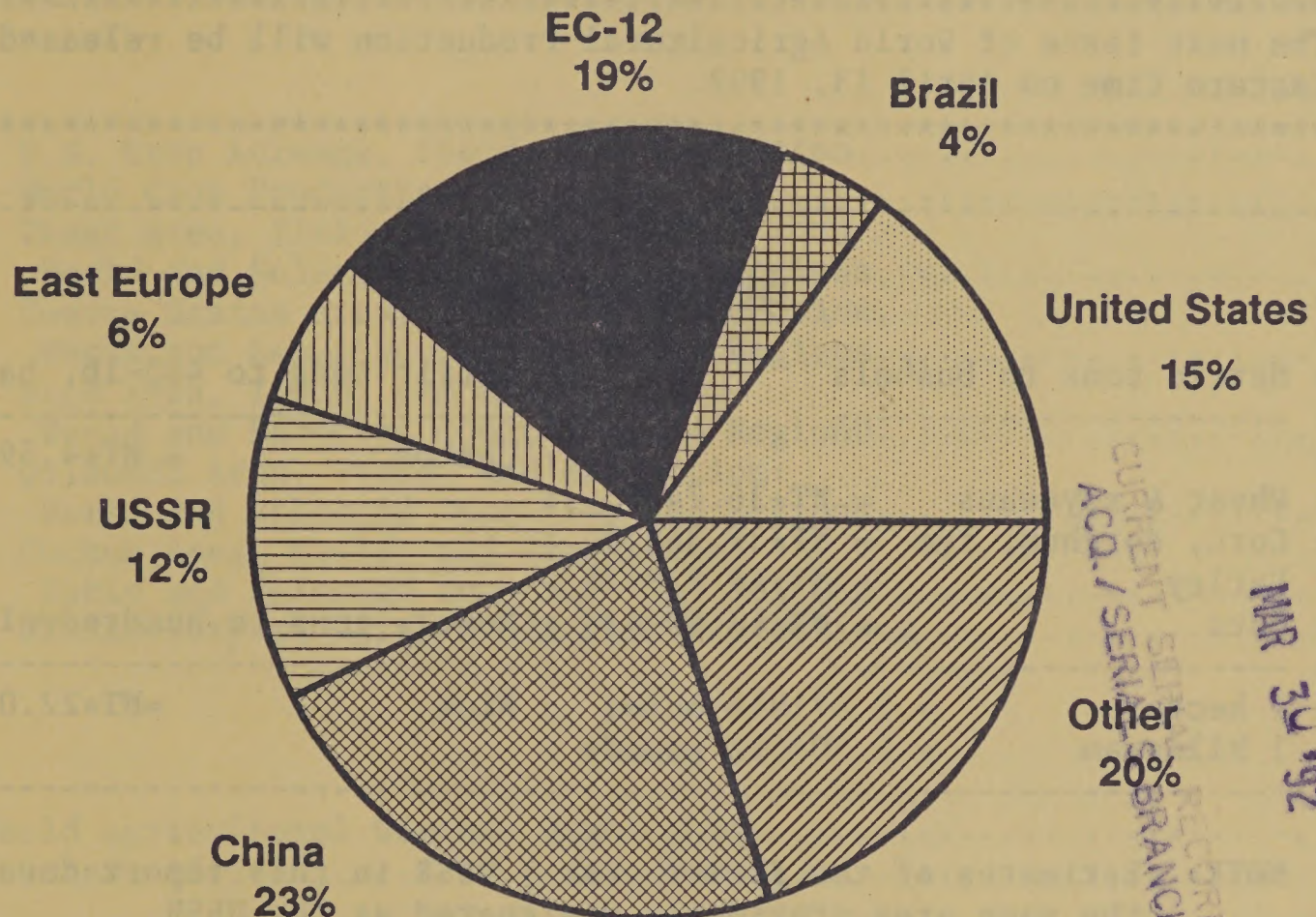
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United States
Department of
Agriculture
Foreign
Agricultural
Service
Circular Series
WAP 3-92
March 1992

World Agricultural Production

World Red Meat Production 1/ 1992 Forecast



1/ Includes carcass-weight-equivalent of beef, veal, pork, sheep, and goat meat.

Production Articles This Month...

World Red Meat
World Cocoa
World Cottonseed
Indian Wheat
Brazilian and Argentine Soybeans
Southern Africa Agricultural Situation

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-264), March 11, 1992.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on April 13, 1992. *

:			:
:	CONVERSION TABLE		:
:			:
:			:
:	Metric tons to bushels	:	Metric tons to 480-lb. bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & soybeans = MT*36.7437	:	
:	Corn, sorghum, rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric tons to hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	

NOTE: Estimates of the Former (Fmr.) USSR in this report cover the same area previously designated as the USSR.

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PRODUCTION HIGHLIGHTS FOR 1991/92

March 1992

WHEAT: World production for 1991/92 is estimated at 547.0 million tons, up 1.1 million or marginally above last month's estimate, but down 8 percent from last year. Total foreign production is estimated at 493.0 million tons, up 1.1 million or less than 1 percent from last month, but down 5 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 53.9 million tons, unchanged from last month, but down 28 percent from last year.
- o Argentina Production is estimated at 9.0 million tons, up 0.5 million or 6 percent from last month, but down 14 percent from last year. Higher-than-expected yield accounts for the production increase.
- o Algeria Production is estimated at 1.7 million tons, up 0.3 million or 20 percent from last month's estimate and up 125 percent from last year's harvest. The increase is due to better-than-expected yield which offset a slight reduction in estimated area.

COARSE GRAINS: World production for 1991/92 is estimated at 803.4 million tons, down 0.8 million or marginally below last month's estimate and down 4 percent from last year. Total foreign production is estimated at 584.9 million tons, down 0.8 million or less than 1 percent from last month and down 3 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 218.5 million tons, unchanged from last month, but down 5 percent from last year.
- o South Africa Production is estimated at 4.9 million tons, down 1.6 million or 25 percent from last month and down 44 percent from last year. Corn production is estimated at 4.5 million tons, the smallest crop since 1983/84 due to the severe drought. The barley and sorghum production estimates were also reduced.
- o Zimbabwe Production is estimated at 1.2 million tons, down 0.5 million or 30 percent from last month and down 33 percent from last year. The country has suffered from a severe drought for 2 months and government officials are forecasting below-normal corn and sorghum yields.

- o Kenya Production is estimated at 2.6 million tons, down 0.5 million or 16 percent from last month, but up 4 percent from last year. Lower corn yield is expected due to unfavorably dry weather.
- o China Production is estimated at 110.3 million tons, down 0.3 million or less than 1 percent from last month and down 3 percent from last year. Sorghum production was reduced by 0.3 million tons to 4.9 million due to lower estimated area. Sorghum area is gradually declining as farmers switch to more profitable crops.
- o Zambia Production is estimated at 1.0 million tons, down 0.3 million or 20 percent from last month and down 8 percent from last year. Although corn area increased this year, projected yields are down significantly due to the drought.
- o EC-12 Production is estimated at 88.6 million tons, down 0.2 million or less than 1 percent from last month, but up 5 percent from last year. Declines in production in Greece, Portugal, Ireland, and Belgium were partially offset by gains in France and Italy.
- o Malawi Production is estimated at 1.5 million tons, down 0.2 million or 12 percent from last month, but up 12 percent from last year. Estimated corn yield was lowered due to increasingly hot and dry weather in the prime production area.
- o Nigeria Production is estimated at 8.2 million tons, down 0.2 million or 2 percent from last month, but up 29 percent from last year. The decline is due to a smaller-than-expected corn crop. Regional outbreaks of downy mildew resulted in harvest losses and yield reductions in Nigeria's Southern Middle Belt and southern growing areas.
- o Brazil Production is forecast at 28.2 million tons, up 1.5 million or 6 percent from last month and up 17 percent from last year. The increase is due to a rise in the area planted to corn in the Center-South growing region and to an estimated record corn yield in the state of Goias.
- o Argentina Production is estimated at 12.6 million tons, up 1.2 million or 11 percent from last month and up 14 percent from last year. Corn and sorghum production is expected to increase 13 and 9 percent, respectively, as a result of better-than-average yields in the main growing regions.

- o Algeria Production is estimated at 1.9 million tons, up 0.3 million or 16 percent from last month's estimate and up 121 percent from last year's harvest. The increase is due primarily to an increase in barley area and better-than-expected yields.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 346.5 million tons, up 0.2 million or marginally above last month's estimate, but down 1 percent from last year's record crop. Total foreign production is projected at 341.6 million tons, up 0.2 million or marginally above last month's estimate, but down 1 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 4.9 million tons, unchanged from last month, but down 4 percent from last year.
- o Philippines Production is estimated at 6.3 million tons, up 0.2 million or 4 percent from last month, but down 2 percent from last year. Larger-than-anticipated wet season (July-December) harvested area and yield improved production prospects.

OILSEEDS: World oilseeds production during 1991/92 is forecast at a record 225.1 million tons, up 0.8 million or less than 1 percent from last month and up 3 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 160.8 million tons, up 0.8 million or 1 percent from last month and up 2 percent from last year. Total oilseed production in the United States is forecast at 64.3 million tons, unchanged from last month, but up 6 percent from last year.

- * Soybeans: World production for 1991/92 is estimated at 105.7 million tons, up 0.5 million or one-half percent from last month and up 2 percent from last year. Total foreign soybean output is estimated at 51.6 million tons, up 0.5 million or 1 percent from last month and up slightly from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 54.0 million tons, unchanged from last month, but up 3 percent from last year. The National Agricultural Statistics Service, USDA, estimates yield at 2.3 tons per hectare from a harvested area of 23.5 million hectares.
- o Brazil Production is estimated at 18.5 million tons, up 1.0 million or 6 percent from last month and up 17 percent from last year. The increase in production is due to higher estimates of both area and yield in the Center-West growing region and an improved outlook for the previously drought stressed Rio Grande do Sul crop.

o China

Production is estimated at 9.6 million tons, down 0.5 million or 5 percent from last month and down 13 percent from last year. Soybean area and yield were hurt by excessively wet weather in northeast and central China.

- * Cottonseed: World production for 1991/92 is estimated at a record 36.5 million tons, up 1.3 million or 4 percent from last month and up 9 percent from last year. Total foreign production is forecast at 30.4 million tons, up 1.3 million or 5 percent from last month and up 8 percent from last year. Country highlights are as follows:

o United States

Production is estimated at 6.1 million tons, unchanged from last month, but up 13 percent from 1990/91. Official estimates by the National Agricultural Statistics Service peg expected average yield at 1.18 tons per hectare and harvested area at 5.2 million hectares.

o China

Production is estimated at 9.6 million tons, up 1.0 million or 11 percent from last month and up 26 percent from last year. Increased area and higher yield led to the second-largest cotton crop on record.

o Pakistan

Production is estimated at a record 4.2 million tons, up 0.4 million or 11 percent from last month and up 27 percent from last year. Record cotton yields are estimated as a consequence of an extended, dry harvest period, resulting in larger-than-normal pickings.

- * Peanuts: World production for 1991/92 is estimated at 22.7 million tons, down 0.6 million or 2 percent from last month, but up 2 percent from 1990/91. Total foreign production is forecast at 20.5 million tons, down 0.6 million or 3 percent from last month and down 1 percent from last year. Country highlights are as follows:

o United States

Production is estimated at a record 2.2 million tons, unchanged from last month, but up 37 percent percent from 1990/91. The National Agricultural Statistics Service estimates average yield at 2.76 tons per hectare from a record harvested area of 0.8 million hectares.

o India

Production is estimated at 7.5 million tons, down 0.5 million or 6 percent from last month and down 1 percent from last year. Lower crop yields were reported in two major summer growing states -- Gujarat and Andhra Pradesh.

- o China Production is estimated at 6.2 million tons, up 0.1 million or 2 percent from last month, but down 3 percent from last year. Peanut yield benefited from good weather in northern China's peanut-growing region.

- * Sunflowerseed: World production for 1991/92 is estimated at 21.5 million tons, down 0.5 million or 2 percent from last month and down 5 percent from 1990/91. Total foreign production is estimated at 19.9 million tons, down 0.5 million or 3 percent from last month and down 8 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 1.6 million tons, unchanged from last month, but up 48 percent from last year. The National Agricultural Statistical Service estimates yield at 1.51 metric tons per hectare from a harvested area of 1.1 million hectares.

 - o Former USSR Production is estimated at 5.6 million tons, down 0.4 million or 6 percent from last month and down 14 percent from last year. The change is based on published harvest results.

 - o China Production is estimated at 1.1 million tons, down 0.2 million or 12 percent from last month and down 18 percent from last year. Yield expectations were reduced by poor weather in the most important sunflower growing areas.

- * Rapeseed: World production for 1991/92 is estimated at a record 28.5 million tons, up 0.1 million or one-half percent from last month and up 13 percent from last year. Total foreign production is estimated at 28.4 million tons, up 0.1 million or one-half percent from last month and up 13 percent from last year. Country highlights are as follows:
 - o United States Production is estimated at 83,000 tons, unchanged from last month, but up 53 percent from last year. The National Agricultural Statistical Service estimates average yield at 1.43 tons per hectare from a harvested area of 58,000 hectares.

 - o China Production is estimated at a record 7.3 million tons, up 0.2 million or 3 percent from last month and up 5 percent from last year. The record harvest was a result of above-normal yield, due to good weather, and an estimated rapeseed harvested area of a record 6.1 million hectares.

- * Flaxseed: World production for 1991/92 is estimated at 2.1 million tons, unchanged from last month, but down 8 percent from last year. Production in the United States for 1991/92 is unchanged this month at an estimated 155,000 tons, up 60 percent from last year. Total foreign production is pegged at 1.9 million tons, unchanged from last month, but down 11 percent from 1990/91. There were no significant country changes this month.
- * Copra: World production for 1991/92 is forecast at 4.6 million tons, unchanged from last month, but down 3 percent from last year. There were no country changes this month.
- * Palm Kernels: World production for 1991/92 is forecast at a record 3.5 million tons, down 31,000 tons or 1 percent from last month, but up 5 percent from last year. There were no significant country changes this month.
- * Palm Oil: World production for 1991/92 is forecast at a record 11.7 million tons, down 69,000 tons or one-half percent from last month, but up 4 percent from last year. There were no significant country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 95.5 million bales. This estimate is up 3.3 million bales or 4 percent from last month and up 10 percent from 1990/91. Total foreign production is projected at a record 77.9 million bales, up 3.3 million or 4 percent from last month and is an increase of 9 percent over 1990/91. Country highlights are as follows:

- o United States Production is estimated at 17.5 million bales, unchanged from last month, but up 13 percent from last year.
- o China Production is estimated at 26.0 million bales, up 2.6 million or 11 percent from last month and up 26 percent from last year. Cotton area increased by 14 percent, coupled with favorable fall weather, led to near-record yields and the second largest crop on record.
- o Pakistan Production is estimated at a record 9.7 million bales, up 0.9 million or 10 percent from last month and up 29 percent from last year. A record crop yield is estimated owing to an unusually long and dry harvest period and increased use of high-yielding varieties. Record yields are estimated for cotton in both Sind and Punjab Provinces.
- o Argentina Production is estimated at 1.2 million bales, down 0.1 million or 8 percent from last month and down 11 percent from last year. Heavy rains early in the season delayed planting, while successive cold and hot temperatures reduced boll set which lowered yields. Cash-strapped farmers reduced inputs and abandonment could increase because of low domestic cotton prices relative to harvest cost.

o Cote d'Ivoire

Production is estimated at 0.5 million bales, down 0.1 million or 17 percent from last month and down 11 percent from 1990/91. The decrease is due to reductions in both harvested area and yield.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD				PRODUCTION			
	1989/90	1990/91	Proj. 1991/92	1989/90	1990/91	Proj. 1991/92	1989/90	1990/91	Prel. 1991/92	1991/92 Proj. Feb. Mar.	1989/90	1990/91	Prel. 1991/92	1991/92 Proj. Feb. Mar.
All Wheat Winter Other Rye	--Million acres--			--Million acres--			--Bushels per acre--				--Million bushels--			
	76.6	77.2	69.9	62.2	69.3	57.7	32.7	39.5	34.3	34.3	2,037	2,736	1,981	1,981
	55.1	56.9	51.0	41.5	49.9	39.4	35.0	40.7	34.8	34.8	1,455	2,031	1,372	1,372
	21.5	20.3	18.9	20.7	19.4	18.3	28.1	36.4	33.3	33.3	582	706	609	609
	2.0	1.6	1.7	0.5	0.4	0.4	28.2	27.1	24.6	24.6	14	10	10	10
Soybeans	60.8	57.8	59.8	59.5	56.5	58.0	32.3	34.1	34.3	34.3	1,924	1,926	1,986	1,986
Corn Sorghum Barley Oats	72.2	74.2	76.0	64.7	67.0	68.8	116.3	118.5	108.9	108.6	7,525	7,933	7,474	7,474
	12.6	10.5	11.0	11.1	9.1	9.8	55.4	63.1	59.0	59.0	615	571	579	579
	9.1	8.2	8.9	8.3	7.5	8.4	48.6	56.1	55.2	55.2	404	422	464	464
	12.1	10.4	8.7	6.9	5.9	4.8	54.3	60.1	50.6	50.6	374	358	243	243
Rice	2.7	2.9	2.9	2.7	2.8	2.8	5,749	5,529	5,617	5,617	154.5	156.1	154.5	154.5
All Cotton	10.6	12.3	14.1	9.5	11.7	12.8	614	634	656	656	12.2	15.5	17.5	17.5

1/ All estimates are from the USDA, National Agricultural Statistics Service (NASS) and are published in the Crop Production circular available from NASS.

March 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe		Fmr. USSR 3/	Asia				South America		Selected Other		All Other Countries			
			United States	Canada	Mexico	EC-12	Oth. W. Europe		Eastern Europe	China	India	Indo-nesia	Paki-stan	Thai-land	Argen-tina	Brazil		Aus-tralia	South Turkey Africa	
——Million metric tons——																				
Wheat 1989/90 1990/91 prel. 1991/92 proj. February March	537.9 593.2	482.4 518.7	55.4 74.5	24.6 32.7	4.0 3.9	82.0 84.6	4.4 5.1	40.7 41.1	92.3 108.0	90.8 98.2	54.1 49.9	0.0 0.0	14.4 14.3	0.0 0.0	10.2 10.5	5.6 3.1	14.2 15.1	2.0 1.7	12.5 15.0	15.4 17.6
	545.9 547.0	492.0 493.0	53.9 53.9	32.8 32.8	3.7 3.7	90.3 90.4	4.1 4.1	39.2 39.2	78.0 78.0	96.0 96.0	54.5 54.5	0.0 0.0	14.5 14.5	0.0 0.0	8.5 9.0	3.2 3.2	10.0 10.0	2.2 2.2	16.0 16.0	17.9 18.1
	802.7 832.6	581.4 601.9	221.4 230.7	23.5 25.4	14.1 18.4	89.8 84.1	12.4 13.7	60.2 52.2	104.8 113.3	93.5 113.5	34.6 33.3	5.0 5.2	2.7 2.9	4.3 4.1	8.3 11.0	22.5 24.2	6.9 6.7	9.5 8.8	7.5 8.9	81.7 76.4
Coarse Grains 1989/90 1990/91 prel. 1991/92 proj. February March	804.2 803.4	585.7 584.9	218.5 218.5	22.7 22.7	17.2 17.2	88.8 88.6	12.1 12.1	61.4 61.4	85.5 85.5	110.6 110.3	31.5 31.5	5.2 5.2	2.5 2.5	3.9 3.9	11.4 12.6	26.7 28.2	6.9 6.9	6.6 4.9	9.7 9.7	83.1 81.7
	344.3 351.5	339.2 346.4	5.1 5.1	0.0 0.0	0.4 0.2	1.4 1.6	0.0 0.0	0.1 0.1	1.7 1.6	126.1 132.5	73.6 74.6	29.1 29.4	3.2 3.3	13.3 11.3	0.2 0.2	4.9 6.3	0.6 0.6	0.0 0.0	0.2 0.2	23.1 23.7
	346.4 346.5	341.5 341.6	4.9 4.9	0.0 0.0	0.2 0.2	1.5 1.4	0.0 0.0	0.1 0.1	1.4 1.4	130.2 130.2	71.0 71.0	28.7 28.7	3.3 3.3	13.2 13.2	0.2 0.2	6.8 6.8	0.8 0.8	0.0 0.0	0.1 0.1	23.3 23.3
Total Grains 1/ 1989/90 1990/91 prel. 1991/92 proj. February March	1,684.9 1,777.3	1,403.0 1,467.0	281.9 310.3	48.0 58.1	18.5 22.5	173.2 170.4	16.8 18.7	101.0 93.5	198.8 222.9	310.4 344.2	162.2 157.7	34.1 34.6	20.4 20.5	17.6 15.4	18.7 21.8	33.0 33.6	21.7 22.3	11.6 10.5	20.2 24.1	196.9 196.4
	1,696.4 1,696.9	1,419.1 1,419.6	277.3 277.3	55.5 55.5	21.1 21.1	180.7 180.5	16.2 16.2	100.7 100.7	164.9 164.9	336.8 336.5	157.0 157.0	33.9 33.9	20.2 20.2	17.1 17.1	20.1 21.8	36.7 38.2	17.7 17.7	8.8 7.2	25.9 25.9	205.9 205.3
	214.1 217.6	154.8 157.0	59.3 60.6	4.9 5.6	1.4 1.0	11.5 13.1	0.7 0.7	5.2 4.3	13.8 13.0	28.5 33.3	19.4 20.3	2.2 2.2	3.3 3.6	0.9 0.8	15.8 16.8	21.6 17.1	0.7 1.9	1.0 1.0	2.3 1.9	21.5 20.3
Oilseeds 2/ 1989/90 1990/91 prel. 1991/92 proj. February March	224.3 225.1	160.0 160.8	64.3 64.3	6.5 6.5	1.1 1.1	13.7 13.7	0.7 0.6	4.1 4.1	12.1 11.7	33.2 33.8	21.4 21.0	2.2 2.2	4.2 4.6	0.7 0.7	15.7 15.6	19.1 20.1	1.0 1.0	0.9 0.8	1.6 1.6	21.8 21.5
	79.9 87.0	67.7 71.5	12.2 15.5	0.0 0.0	0.8 0.8	1.5 1.4	0.0 0.0	0.1 0.1	12.2 11.9	17.4 20.7	10.6 9.1	0.0 0.0	6.7 7.5	0.1 0.1	1.3 1.4	3.0 3.2	1.4 2.0	0.3 0.2	2.8 3.0	9.5 10.0
	92.2 95.5	74.7 77.9	17.5 17.5	0.0 0.0	0.8 0.8	1.3 1.3	0.0 0.0	0.1 0.1	11.3 11.3	23.4 26.0	9.1 9.1	0.0 0.0	8.8 9.7	0.2 0.2	1.3 1.2	3.8 3.8	1.7 1.7	0.2 0.2	2.6 2.6	10.2 10.0
Cotton 1989/90 1990/91 prel. 1991/92 proj. February March	——Million 480-pound bales——																			
	79.9 87.0	67.7 71.5	12.2 15.5	0.0 0.0	0.8 0.8	1.5 1.4	0.0 0.0	0.1 0.1	12.2 11.9	17.4 20.7	10.6 9.1	0.0 0.0	6.7 7.5	0.1 0.1	1.3 1.4	3.0 3.2	1.4 2.0	0.3 0.2	2.8 3.0	9.5 10.0
	92.2 95.5	74.7 77.9	17.5 17.5	0.0 0.0	0.8 0.8	1.3 1.3	0.0 0.0	0.1 0.1	11.3 11.3	23.4 26.0	9.1 9.1	0.0 0.0	8.8 9.7	0.2 0.2	1.3 1.2	3.8 3.8	1.7 1.7	0.2 0.2	2.6 2.6	10.2 10.0

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains, and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million projected for 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

3/ Fmr. USSR covers the same area previously designated USSR.

Note: Entries of 0.0 indicate no reported or insignificant production.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Feb. Mar.		1989/90	Prel. 1990/91	1991/92 Proj. Feb. Mar.	
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	226.4	232.1	222.9	2.38	2.56	2.45	2.45	537.9	593.2	545.9	547.0
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	204.1	199.6	2.40	2.54	2.46	2.47	482.4	518.7	492.0	493.0
Maj. Foreign Exporters	45.1	45.8	44.0	2.91	3.12	3.23	3.23	131.0	142.9	141.7	142.3
Argentina	5.5	5.7	4.5	1.86	1.84	1.89	2.00	10.2	10.5	8.5	9.0
Australia	9.0	9.2	7.8	1.58	1.63	1.28	1.28	14.2	15.1	10.0	10.0
Canada	13.6	14.4	14.5	1.80	2.27	2.26	2.26	24.6	32.7	32.8	32.8
EC-12	17.0	16.5	17.2	4.83	5.14	5.28	5.26	82.0	84.6	90.3	90.4
Major Importers	96.6	98.4	95.7	2.48	2.66	2.40	2.41	239.1	261.3	230.2	230.5
Brazil	3.4	3.3	2.4	1.65	0.94	1.33	1.33	5.6	3.1	3.2	3.2
China	29.8	30.8	30.8	3.04	3.19	3.10	3.12	90.8	98.2	96.0	96.0
Eastern Europe	9.8	9.7	10.0	4.14	4.22	3.93	3.93	40.7	41.1	39.2	39.2
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.9	5.4	5.5	1.14	1.04	1.50	1.56	5.6	5.7	8.4	8.6
Japan	0.3	0.3	0.2	3.47	3.66	2.93	3.18	1.0	1.0	0.7	0.8
Fmr. USSR 2/	47.7	48.2	46.0	1.94	2.24	1.70	1.70	92.3	108.0	78.0	78.0
Other Foreign	59.7	59.9	59.9	1.88	1.91	2.01	2.01	112.3	114.5	120.1	120.2
India	24.1	23.5	24.0	2.24	2.12	2.27	2.27	54.1	49.9	54.5	54.5
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	4.20	4.20	4.0	3.9	3.7	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.22	5.22	4.4	5.1	4.1	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.58	1.58	2.0	1.7	2.2	2.2
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.8	9.8	1.77	1.80	1.83	1.84	15.4	17.6	17.9	18.1

1/ Algeria, Libya, Morocco, and Tunisia.

2/ Fmr. USSR covers the same area previously designated USSR.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Feb.	Proj. Mar.	Prel. 1989/90	1991/92 1990/91	Proj. Feb.	Proj. Mar.
<i>TOTAL COARSE GRAINS</i>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World 1/	322.9	316.4	324.0	2.49	2.63	2.49	2.48	802.7	832.6	804.2	803.4
United States	37.0	36.4	37.3	5.98	6.34	5.85	5.85	221.4	230.7	218.5	218.5
Total Foreign	285.9	280.0	286.7	2.03	2.15	2.05	2.04	581.4	601.9	585.7	584.9
Maj. Foreign Exporters	21.0	20.2	21.1	2.50	2.77	2.44	2.41	52.5	55.9	51.4	50.9
Argentina	3.2	3.3	3.9	2.64	3.37	3.03	3.26	8.3	11.0	11.4	12.6
Australia	3.9	4.1	4.9	1.77	1.64	1.40	1.40	6.9	6.7	6.9	6.9
Canada	8.3	7.6	6.9	2.84	3.32	3.29	3.29	23.5	25.4	22.7	22.7
South Africa	4.1	3.7	4.0	2.31	2.37	1.64	1.25	9.5	8.8	6.6	4.9
Thailand	1.6	1.5	1.5	2.78	2.65	2.60	2.60	4.3	4.1	3.9	3.9
Major Importers	103.8	99.8	101.8	2.73	2.84	2.62	2.62	282.9	283.2	266.6	266.3
Eastern Europe	16.5	15.9	16.5	3.66	3.28	3.73	3.73	60.2	52.2	61.4	61.4
EC-12	20.3	19.3	19.1	4.43	4.36	4.64	4.65	89.8	84.1	88.8	88.6
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.24	4.24	12.4	13.7	12.1	12.1
Mexico	7.5	8.2	8.8	1.88	2.23	1.95	1.95	14.1	18.4	17.2	17.2
Fmr. USSR 2/	56.0	52.9	54.2	1.87	2.14	1.58	1.58	104.8	113.3	85.5	85.5
Other Major Import. 3/	0.4	0.4	0.4	3.83	3.72	3.69	3.63	1.6	1.5	1.5	1.4
Other Foreign	161.1	159.9	163.8	1.53	1.64	1.64	1.63	245.9	262.7	267.8	267.7
Brazil	12.5	13.5	14.0	1.79	1.79	1.98	2.02	22.5	24.2	26.7	28.2
China	28.2	29.1	29.0	3.31	3.90	3.80	3.80	93.5	113.4	110.6	110.3
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Nigeria	9.9	9.5	9.8	0.82	0.67	0.84	0.83	8.1	6.3	8.3	8.2
Philippines	3.6	3.9	3.6	1.22	1.32	1.14	1.28	4.4	5.1	4.4	4.6
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.9	59.8	63.3	1.14	1.11	1.14	1.11	70.3	66.3	71.3	70.0
<i>BARLEY</i>											
World	74.9	73.9	78.0	2.27	2.52	2.20	2.19	170.1	186.3	170.6	170.6
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	70.9	74.6	2.26	2.50	2.17	2.15	161.3	177.1	160.4	160.4
Australia	2.3	2.5	2.8	1.75	1.62	1.43	1.43	4.0	4.1	4.0	4.0
Canada	4.7	4.7	4.5	2.50	2.96	2.78	2.78	11.7	13.9	12.5	12.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.74	3.74	14.5	14.3	14.3	14.3
EC-12	12.6	12.3	12.1	4.05	4.12	4.21	4.21	51.0	50.8	51.0	50.8
Other W. Europe	1.5	1.5	1.5	3.87	4.37	3.99	3.99	5.9	6.4	6.1	6.1
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
Fmr. USSR 2/	27.6	26.1	28.5	1.75	2.34	1.51	1.51	48.5	61.0	43.0	43.0
Others	12.6	13.5	14.7	1.20	1.10	1.22	1.18	15.1	14.9	17.1	17.3

FOOTNOTES AT END OF TABLE.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	1989/90	Prel. 1990/91	Proj. 1991/92	1989/90	Prel. 1990/91	1991/92 Proj. Feb.	Mar.	1989/90	Prel. 1990/91	1991/92 Proj. Feb.	Mar.
<u>CORN</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	126.5	127.3	131.7	3.66	3.76	3.66	3.65	462.5	478.6	481.3	480.6
United States	26.2	27.1	27.9	7.30	7.44	6.82	6.82	191.2	201.5	189.9	189.9
Total Foreign	100.4	100.2	103.8	2.70	2.76	2.81	2.80	271.4	277.0	291.4	290.8
Maj. Foreign Exporters	6.6	6.3	7.0	2.77	3.10	2.58	2.47	18.2	19.6	17.7	17.2
Argentina	1.7	2.0	2.4	3.06	3.90	3.48	3.75	5.2	7.6	8.0	9.0
South Africa	3.5	3.0	3.3	2.56	2.71	1.85	1.38	8.9	8.2	6.0	4.5
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.6	22.2	3.93	3.51	3.84	3.84	83.4	68.9	85.3	85.3
Eastern Europe	7.1	6.5	6.8	4.14	3.26	4.55	4.55	29.2	21.1	30.9	30.9
EC-12	3.9	3.4	3.9	6.91	6.29	6.86	6.85	26.9	21.7	26.6	26.5
Other W. Europe	0.2	0.2	0.2	7.83	7.98	8.34	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.7	1.68	2.14	1.88	1.88	9.8	14.1	14.5	14.5
Fmr. USSR 2/	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 3/	0.1	0.1	0.1	4.28	4.47	4.13	4.16	0.5	0.5	0.5	0.5
Other Foreign	72.6	74.2	74.7	2.34	2.54	2.53	2.52	169.8	188.5	188.4	188.3
Brazil	12.1	13.0	13.5	1.80	1.81	2.00	2.04	21.8	23.5	26.0	27.5
Canada	1.0	1.0	1.1	6.36	6.91	6.75	6.75	6.4	7.2	7.3	7.3
China	20.4	21.4	21.5	3.88	4.52	4.41	4.41	78.9	96.8	95.0	95.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.47	1.47	9.4	9.4	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Philippines	3.6	3.9	3.6	1.22	1.32	1.14	1.28	4.4	5.1	4.4	4.6
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.30	0.87	2.0	1.6	1.5	1.0
Others	25.0	24.0	24.3	1.50	1.46	1.47	1.42	37.3	35.1	35.8	34.6
<u>SORGHUM</u>											
World	41.6	39.0	40.8	1.32	1.36	1.31	1.32	55.0	53.0	53.7	53.7
United States	4.5	3.7	4.0	3.48	3.96	3.70	3.70	15.6	14.6	14.7	14.7
Total Foreign	37.1	35.3	36.8	1.06	1.09	1.06	1.06	39.4	38.4	39.0	39.0
Argentina	0.7	0.7	0.8	2.86	3.57	2.95	3.21	2.0	2.5	2.3	2.5
Australia	0.4	0.4	0.6	2.49	2.22	1.72	1.72	0.9	0.9	1.1	1.1
China	1.6	1.5	1.4	2.72	3.67	3.47	3.50	4.4	5.7	5.2	4.9
India	14.9	14.8	15.0	0.86	0.82	0.80	0.80	12.9	12.1	12.0	12.0
Mexico	1.3	1.3	0.8	2.88	2.85	2.75	2.75	3.8	3.7	2.2	2.2
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.1	0.1	0.2	2.09	2.18	1.00	1.33	0.3	0.3	0.2	0.2
Sudan	4.0	3.0	4.2	0.45	0.50	0.69	0.69	1.8	1.5	2.9	2.9
Thailand	0.2	0.2	0.2	1.44	1.39	1.06	1.06	0.2	0.3	0.2	0.2
Others	9.4	9.0	9.3	1.01	0.98	1.02	1.02	9.6	8.8	9.4	9.5

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Feb.	Proj. Mar.	Prel. 1989/90	1991/92 1990/91	Proj. Feb.	Proj. Mar.
OATS	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	22.6	21.3	20.4	1.84	1.98	1.68	1.68	41.4	42.1	34.4	34.3
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.4	1.82	1.95	1.67	1.67	36.0	36.9	30.8	30.8
Fmr. USSR 2/	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	2.9	2.00	2.16	1.81	1.81	7.3	6.4	5.3	5.3
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.15	1.15	1.6	1.5	1.5	1.5
Canada	1.7	1.2	0.9	2.08	2.34	2.14	2.14	3.5	2.9	1.9	1.9
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.2	4.8	2.21	2.40	2.28	2.29	11.9	12.6	11.0	11.0
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.54	2.54	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.65	2.65	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.06	3.11	3.15	4.8	5.0	4.4	4.4
France	0.3	0.2	0.2	3.73	3.88	3.81	4.23	1.0	0.8	0.8	0.7
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.38	3.97	3.97	0.4	0.6	0.5	0.5
Others	1.3	1.2	1.2	1.11	1.08	1.16	1.16	1.4	1.4	1.4	1.4
RYE											
World	16.3	15.9	13.2	2.16	2.27	2.01	2.01	35.2	36.0	26.6	26.6
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.1	15.7	13.0	2.17	2.28	2.02	2.02	34.8	35.7	26.3	26.3
Fmr. USSR 2/	10.7	10.4	8.5	1.87	2.02	1.59	1.59	20.1	21.0	13.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.70	1.86	1.86	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	2.7	2.7	2.7	2.75	2.67	2.62	2.62	7.3	7.2	7.0	7.0
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.3	2.3	2.3	2.73	2.61	2.58	2.58	6.2	6.0	5.9	5.9
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.66	3.66	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	4.57	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.21	2.21	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Fmr. USSR covers the same area previously designated USSR . 3/ Japan, Republic of Korea, and Taiwan.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)		
	Prel.	Proj.	1989/90	1990/91	1991/92 Proj.	Prel.	1989/90	1990/91	Prel.	1989/90	1990/91	Prel.	1989/90	1990/91
	1990/91	1991/92	1989/90	1990/91	Feb.	Mar.	1989/90	1990/91	Feb.	Mar.	1989/90	1990/91	Feb.	Mar.
	—Million hectares—		—Metric tons per hectare—			—Million metric tons—			—Percent—			—Million metric tons—		
World	146.8	146.6	146.1	1.1	1.1	1.1	146.8	146.6	146.1	1.1	1.1	1.1	146.8	146.6
United States	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1	1.1
Total Foreign	145.7	145.5	145.0				145.7	145.5	145.0				145.7	145.5
Maj. Foreign Exporters	16.8	15.7	16.6				16.8	15.7	16.6				16.8	15.7
Burma	4.7	4.8	4.5				4.7	4.8	4.5				4.7	4.8
Pakistan	2.1	2.1	2.1				2.1	2.1	2.1				2.1	2.1
Thailand	10.0	8.8	10.0				10.0	8.8	10.0				10.0	8.8
Major Importers	13.9	13.9	13.5				13.9	13.9	13.5				13.9	13.5
EC-12	0.3	0.4	0.4				0.3	0.4	0.4				0.3	0.4
Indonesia	10.5	10.5	10.1				10.5	10.5	10.1				10.5	10.1
Nigeria	0.6	0.7	0.7				0.6	0.7	0.7				0.6	0.7
Republic of Korea	1.3	1.2	1.2				1.3	1.2	1.2				1.3	1.2
Other Maj. Import. 1/	1.2	1.1	1.1				1.2	1.1	1.1				1.2	1.1
Other Foreign	114.9	115.9	114.9				114.9	115.9	114.9				114.9	115.9
Australia	0.1	0.1	0.1				0.1	0.1	0.1				0.1	0.1
Bangladesh	10.5	10.4	10.5				10.5	10.4	10.5				10.5	10.4
Brazil	4.3	4.5	5.3				4.3	4.5	5.3				4.3	4.5
China	32.7	33.1	32.6				32.7	33.1	32.6				32.7	33.1
India	42.2	42.6	41.1				42.2	42.6	41.1				42.2	42.6
Japan	2.1	2.1	2.0				2.1	2.1	2.0				2.1	2.0
Philippines	3.4	3.4	3.4				3.4	3.4	3.4				3.4	3.4
Fmr. USSR 2/	0.7	0.6	0.6				0.7	0.6	0.6				0.7	0.6
Vietnam	6.1	6.1	6.3				6.1	6.1	6.3				6.1	6.3
Others	12.9	13.0	13.0				12.9	13.0	13.0				12.9	13.0

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

2/ Fmr. USSR covers the same area previously designated USSR.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.		Prel.	1991/92 Proj.		Prel.	1991/92 Proj.			
	1989/90	1990/91	1991/92	1989/90	1990/91	Feb.	Mar.	1989/90	1990/91	Feb.	Mar.
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
<u>SOYBEANS</u>											
World	58.37	54.06	54.63	1.84	1.92	1.93	1.93	107.35	103.94	105.23	105.68
United States	24.09	22.87	23.45	2.17	2.29	2.30	2.30	52.35	52.42	54.04	54.04
Total Foreign	34.27	31.19	31.18	1.60	1.65	1.64	1.66	55.00	51.52	51.19	51.64
Maj. Foreign Exporters	16.35	14.45	14.80	1.90	1.89	1.92	1.96	31.09	27.25	28.00	29.00
Argentina	4.95	4.80	4.80	2.17	2.40	2.19	2.19	10.75	11.50	10.50	10.50
Brazil	11.40	9.65	10.00	1.78	1.63	1.79	1.85	20.34	15.75	17.50	18.50
Other Foreign	17.92	16.74	16.38	1.33	1.45	1.40	1.38	23.91	24.27	23.19	22.64
Canada	0.54	0.49	0.58	2.26	2.63	2.44	2.44	1.22	1.29	1.41	1.41
China	8.06	7.56	7.05	1.27	1.46	1.40	1.36	10.23	11.00	10.10	9.60
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.35	1.35	0.68	0.36	0.33	0.33
EC-12	0.63	0.69	0.54	3.13	3.09	3.10	3.10	1.98	2.14	1.68	1.68
India	2.25	2.37	2.60	0.80	1.02	0.85	0.85	1.81	2.42	2.20	2.20
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
Fmr. USSR 1/	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.36	2.42	1.52	1.51	1.51	1.49	4.15	3.57	3.66	3.61
<u>COTTONSEED</u>											
World	31.62	33.07	34.33	0.97	1.01	1.03	1.06	30.82	33.43	35.16	36.48
United States	3.86	4.75	5.20	1.10	1.14	1.18	1.18	4.24	5.42	6.13	6.13
Total Foreign	27.76	28.32	29.13	0.96	0.99	1.00	1.04	26.58	28.02	29.03	30.35
China	5.20	5.59	6.35	1.24	1.37	1.42	1.52	6.44	7.67	8.67	9.62
India	7.33	7.36	7.27	0.60	0.53	0.54	0.54	4.40	3.90	3.90	3.90
Pakistan	2.60	2.69	2.78	1.12	1.21	1.38	1.52	2.91	3.27	3.83	4.22
Fmr. USSR 1/	3.33	3.17	3.01	1.53	1.54	1.48	1.48	5.11	4.88	4.45	4.45
Others	9.30	9.51	9.73	0.83	0.87	0.84	0.84	7.72	8.30	8.18	8.15
<u>PEANUTS</u>											
World	19.82	19.40	20.03	1.11	1.15	1.15	1.14	22.06	22.27	23.31	22.74
United States	0.67	0.73	0.81	2.72	2.23	2.76	2.76	1.81	1.63	2.24	2.24
Total Foreign	19.15	18.67	19.22	1.06	1.11	1.08	1.07	20.25	20.64	21.06	20.50
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.98	1.81	2.19	2.09	2.08	5.37	6.37	6.10	6.20
India	8.71	8.30	8.75	0.93	0.92	0.91	0.86	8.10	7.62	8.00	7.50
Senegal	0.78	0.91	0.88	1.04	0.74	0.77	0.82	0.82	0.67	0.70	0.72
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.73	5.81	0.87	0.88	0.88	0.89	5.12	5.04	5.33	5.14

FOOTNOTES AT END OF TABLE.

March 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Feb.	Mar.	1989/90	1990/91	Feb.	Mar.
<u>SUNFLOWERSEED</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	15.64	16.35	16.53	1.40	1.38	1.33	1.30	21.89	22.57	22.04	21.52
United States	0.72	0.75	1.08	1.10	1.38	1.51	1.51	0.80	1.03	1.64	1.64
Total Foreign	14.92	15.60	15.45	1.41	1.38	1.32	1.29	21.09	21.54	20.40	19.88
Argentina	2.80	2.30	2.50	1.36	1.70	1.56	1.56	3.80	3.90	3.90	3.90
China	0.72	0.71	0.75	1.49	1.88	1.76	1.47	1.06	1.34	1.25	1.10
EC-12	2.13	2.58	2.41	1.67	1.64	1.66	1.66	3.54	4.23	4.00	4.00
East Europe	1.27	1.23	1.24	1.81	1.70	1.71	1.71	2.29	2.09	2.13	2.13
Fmr. USSR 1/	4.46	4.67	4.50	1.59	1.41	1.30	1.25	7.07	6.56	6.00	5.64
Others	3.55	4.12	4.05	0.94	0.83	0.78	0.77	3.33	3.42	3.12	3.11
<u>RAPESEED</u>											
World	17.10	18.24	20.48	1.28	1.38	1.38	1.39	21.86	25.12	28.35	28.46
United States	0.03	0.03	0.06	1.58	1.74	1.43	1.43	0.05	0.05	0.08	0.08
Total Foreign	17.07	18.21	20.42	1.28	1.38	1.38	1.39	21.81	25.07	28.26	28.38
Canada	2.90	2.58	3.27	1.07	1.27	1.32	1.32	3.10	3.28	4.30	4.30
China	4.99	5.50	6.10	1.09	1.26	1.16	1.20	5.44	6.96	7.10	7.30
EC-12	1.81	2.13	2.42	2.96	2.89	3.05	3.05	5.34	6.14	7.39	7.39
East Europe	0.81	0.74	0.69	2.66	2.38	2.30	2.30	2.15	1.75	1.58	1.58
India	4.97	5.72	6.30	0.83	0.90	0.95	0.95	4.13	5.15	6.00	6.00
Others	1.59	1.54	1.65	1.04	1.16	1.10	1.10	1.66	1.78	1.89	1.81
<u>FLAXSEED</u>											
World	3.68	3.74	3.42	0.50	0.61	0.61	0.61	1.84	2.27	2.10	2.10
United States	0.07	0.10	0.14	0.47	0.95	1.14	1.14	0.03	0.10	0.16	0.16
Total Foreign	3.62	3.64	3.29	0.50	0.60	0.59	0.59	1.81	2.18	1.94	1.94
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.69	0.69
India	1.12	1.15	1.10	0.29	0.30	0.32	0.32	0.33	0.34	0.35	0.35
Fmr. USSR 1/	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.39	0.67	0.77	0.94	0.94	0.24	0.26	0.36	0.36
<u>MAJOR OILSEEDS</u>	146.23	144.86	149.43	1.41	1.45	1.45	1.45	205.82	209.61	216.17	216.98
United States	29.44	29.23	30.74	2.01	2.07	2.09	2.09	59.29	60.65	64.29	64.29
Total Foreign	116.79	115.63	118.69	1.25	1.29	1.28	1.29	146.53	148.96	151.89	152.69
<u>COPRA</u>	--	--	--	--	--	--	--	4.90	4.70	4.57	4.57
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.32	3.53	3.50
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.06	217.62	224.28	225.05
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.91	11.24	11.78	11.72

1/ Fmr. USSR covers the same area previously designated USSR. 2/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 Proj. 1990/91 Feb.	1991/92 Proj. Mar.		Prel. 1989/90	1991/92 Proj. 1990/91 Feb.	1991/92 Proj. Mar.	
	---Million hectares---			---Kilograms per hectare---				---Million 480-pound bales---			
World	31.6	33.0	34.2	551	574	590	607	79.9	87.0	92.2	95.5
United States	3.9	4.7	5.2	688	711	735	735	12.2	15.5	17.5	17.5
Total Foreign	27.7	28.3	29.0	532	551	564	584	67.7	71.5	74.7	77.9
Maj. Foreign Exporters	13.1	13.2	13.9	725	791	809	849	43.5	48.0	50.7	54.1
Australia	0.2	0.3	0.3	1,271	1,604	1,340	1,340	1.4	2.0	1.7	1.7
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.4	728	807	835	891	17.4	20.7	23.4	26.0
Egypt	0.4	0.4	0.4	683	719	846	816	1.3	1.4	1.4	1.4
Mexico	0.2	0.2	0.3	891	914	704	704	0.8	0.8	0.8	0.8
Pakistan	2.6	2.7	2.8	560	615	690	761	6.7	7.5	8.8	9.7
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	947	947	2.8	3.0	2.6	2.6
USSR 2/	3.3	3.2	3.0	796	820	817	817	12.2	11.9	11.3	11.3
Major Importers 3/	0.4	0.4	0.3	887	803	855	855	1.5	1.5	1.4	1.4
Other Foreign	14.3	14.7	14.8	346	327	332	330	22.6	22.0	22.6	22.4
Argentina	0.6	0.6	0.6	486	468	439	415	1.3	1.4	1.3	1.2
Brazil	1.9	2.0	2.2	347	352	376	376	3.0	3.2	3.8	3.8
India	7.3	7.4	7.3	315	270	274	274	10.6	9.1	9.1	9.1
Syria	0.2	0.2	0.2	930	928	979	979	0.7	0.7	0.9	0.9
Others	4.3	4.5	4.5	357	367	363	359	7.0	7.6	7.6	7.5

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Fmr. USSR covers the same area previously designated USSR.

3/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

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TABLE 8

The table below presents a 10-year record of the difference between the March projections and the final estimates. Using world wheat production as an example, changes between the March projection and the final estimate have averaged 3.3 million tons (0.7 percent) and ranged from -8.0 to 6.9 million tons. The March projection has been below the final 7 times and above the final 3 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 - 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	--- <i>Million metric tons</i> ---			Number of years 2/	
<i>WHEAT</i>						
World	0.7	3.3	-8.0	6.9	7	3
U.S.	0.1	0.0	-0.1	0.1	4	2
Foreign	0.8	3.3	-8.0	6.9	7	3
<i>COARSE GRAINS 3/</i>						
World	0.7	5.3	-10.9	4.1	7	3
U.S.	0.1	0.2	-0.2	1.3	6	1
Foreign	0.9	5.4	-10.9	4.2	7	3
<i>RICE (Milled)</i>						
World	1.4	4.4	-10.0	2.3	9	1
U.S.	1.3	0.1	-0.2	0.1	4	1
Foreign	1.4	4.4	-9.9	2.3	9	1
<i>SOYBEANS</i>						
World	1.6	1.5	-2.2	1.5	5	5
U.S.	1.2	0.6	-1.1	1.8	4	5
Foreign	2.6	1.2	-2.2	1.6	7	3
			--- <i>Million 480-lb. bales</i> ---			
<i>COTTON</i>						
World	1.1	0.9	-2.9	3.0	4	5
U.S.	0.8	0.1	-0.1	0.3	2	7
Foreign	1.3	0.9	-3.2	2.9	4	6
<i>UNITED STATES</i>			----- <i>Million bushels</i> -----			
<i>CORN</i>	0.1	5	-8	38	2	1
<i>SORGHUM</i>	0.1	1	0	4	0	2
<i>BARLEY</i>	0.5	2	-3	11	6	1
<i>OATS</i>	0.1	0	-2	0	3	0

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 10 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

March 1992

Production Estimates and Crop Assessment Division, FAS, USDA

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

MARCH 11, 1992



1 - UNITED STATES

Mild temperatures and abundant moisture promote early growth of winter wheat. Fruit tree buds developed early in the south. Wet soils hamper early season fieldwork in Gulf States. A cold outbreak on March 10 caused minor damage to wheat.

2 - SOUTH AMERICA

Recent dryness depletes soil moisture for late-planted soybeans, while favoring early corn harvesting in Argentina. Adequate rainfall favors pod-filling soybeans across southern Brazil. Summer crop prospects remain favorable in both countries.

3 - EUROPE

Below normal precipitation continued during February, except for southern Spain and scattered areas across the north. Unseasonable warmth promotes early spring fieldwork and greening of winter grains but moisture reserves are limited.

4 - FORMER USSR

Winter grains remain dormant. Overwintering conditions continue favorable. Unseasonably warm weather diminishes snow cover in the west 3-4 weeks earlier than usual.

5 - SOUTH AFRICA

Western corn deteriorated further during February. Mid-month showers brought some relief to moisture sensitive corn and sugarcane in the east.

6 - SOUTH ASIA

Periodic February showers benefit reproductive to filling grains and oilseeds in Pakistan and northern India, as well as eastern rice approaching maturity.

7 - EASTERN ASIA

Warm temperatures help winter wheat break dormancy, but a recent cold snap slows early growth. Beneficial rain aids moisture for vegetative winter wheat and favors early transplanted rice across southern China.

8 - SOUTHEAST ASIA

Showers are seasonable for Java's rice, but sporadic over Malaysia and the Philippines. Late-February rains boost reservoirs in Indochina.

9 - AUSTRALIA

Heavy rains benefit eastern summer crops and southern sugarcane, but cause local flooding. Northern sugarcane areas receive below normal rainfall in February.

10 - NORTHWESTERN AFRICA

Recent showers in Morocco stabilize conditions for winter grains stressed by adverse dryness since November. Timely showers in Algeria and Tunisia benefit winter grains entering reproduction.

(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)

WEATHER BRIEFS

SOUTHERN AFRICA: DROUGHT CONTINUES

Precipitation has been well below normal across the western and southern portions of the South African "Maize Triangle" during the period of January 1 - March 11, 1992. These areas historically lead the country in corn production. Corn advanced through the crucial reproductive and grain filling stages under extremely unfavorable weather conditions; mostly above normal temperatures and low soil moisture. Temperatures moderated during the week of March 1 - 7, 1992, somewhat reducing stress, but had limited impact as the crop advanced toward maturity. Prior to December, precipitation was generally above normal, favoring early planting. Precipitation elsewhere, while still below normal across southeast Transvaal and the eastern "Maize Triangle", was more frequent and widespread during January 12 - March 7, producing a marginally better environment for corn production. The eastern portion of the "Maize Triangle" generally produces about 30 percent of the country's corn. Precipitation was also more frequent and widespread during January 1 - March 7 across the southern Cape Province and Natal, benefiting major fruit and sugar cane areas.

During February 10 - March 11, 1992, drought conditions expanded across Zimbabwe's major summer crop production region in the north and into Zambia and Malawi. Until early February, seasonal precipitation was normal-to-above normal across northern Zimbabwe, the country's major summer crop production area. Temperatures during February 10 - March 11 were well above normal, adding to further deterioration in crop conditions.

NORTHWEST AFRICA: MOROCCO RECEIVES SOME RAIN

Unseasonably frequent and sometimes heavy rains fell across northwestern Africa's wheat growing areas during September and October 1991, boosting soil moisture levels and allowing for an early start to winter grains planting. This precipitation favored germination and early growth. However, during November 1, 1991 - January 10, 1992, dry weather across Morocco and central and western Algeria depleted soil moisture reserves, creating unfavorable growing conditions. The major winter grain growing areas of Morocco were dry during January 11 - February 10, causing further deterioration in crop prospects. Rainfall increased in amount and frequency during February 11 - March 11 across northern Morocco, helping to stabilize crop condition. In contrast, precipitation continued well below normal across Morocco's southern winter grain area. Rainfall became more widespread and frequent across central and western Algeria during January 19 - March 7, reversing the drying trend and improving winter grain growing conditions. In northeastern Algeria and Tunisia, precipitation during December 1991 through early March 1992 has been near-normal, providing mostly adequate moisture for winter grains. Winter grains are generally nearing the heading stage across northwestern Africa during mid-March, with moisture conditions becoming the most critical factor determining yield prospects.

PHILIPPINES: ANOTHER DRY WINTER

For the third consecutive year precipitation during February and early March, 1992 has been well below normal across the Philippines. Normally an easterly flow during this time brings 25-100 millimeters of rainfall per week to widespread portions of the archipelago. Increased rainfall is needed for upcoming planting and to improve conditions for the secondary rice crops. Reservoir levels and soil moisture are also below normal due to a decrease in the frequency of tropical storms. As of March 11, Mindanao and northeastern Luzon are currently the driest areas.

PRODUCTION BRIEFS

AUSTRALIA: WOOL PRODUCTION OUTLOOK

Australian wool production in 1991/92 is expected to drop 22 percent below the 1990/91 level of 1.01 million tons (greasy equivalent), according to the U.S. agricultural counselor in Canberra. A reduction of this magnitude would constitute the largest one-year decline since the beginning of the century and result in the lowest wool production level since 1986/87. The downturn forecast for 1991/92 reflects the combined effects of substantially lower prices, reduced flock numbers, and drought conditions in several production areas. Reportedly, prices have bottomed out, but should begin to rise over the next few years. However, large stockpiles of wool are expected to moderate any price increases.

BRAZIL: 1992/93 COFFEE FORECAST REVISED UPWARD

Brazil's 1992/93 coffee production is forecast at 24 million (60-kilogram) bags, up 9 percent or 2 million bags from the December 1991 forecast of 22 million bags (WAP 12-91), according to the U.S. agricultural counselor in Brasilia. This second forecast for the 1992/93 season was based on field travel assessments, during late January, through Brazil's major coffee producing areas in the states of Parana, Sao Paulo, and Minas Gerais. The new Brazilian forecast reflects the biological yield of coffee at the time of the survey. However, if international and domestic prices remain low, growers may decide to leave some of the beans unharvested.

In the states of Parana and Sao Paulo, the load of cherries on coffee trees appeared to be developing satisfactorily with no apparent losses. In both States, coffee trees carrying good size crops reportedly received proper chemical spraying to control the development and spread of the rust fungus. No adjustment from the original forecast has been made in either state.

The entire 9-percent increase in the Brazilian coffee estimate is attributed to the larger coffee crop expected in the state of Minas Gerais. One-third of the trees in the central, west, and southwest regions had one major bloom last November followed by excellent cherry setting and development even though the regions are in an "off-year" production cycle. This condition was caused by adequate rainfall and improved plantation management.

In eastern Minas Gerais, the state of Espirito Santo, and minor-producing states, the 1992/93 production estimates remain unchanged from the earlier forecasts.

CHINA: AGRICULTURAL PRODUCTION UP IN 1991

Chinese Government statistics indicate that 1991 was a very good year for agricultural production. Grain production is estimated at 435.0 million tons, down 11.0 million tons from 1990's record harvest, but still the second largest crop in history. This was achieved despite serious flooding that affected 20 percent of the country's farmland last summer. Cotton production totaled 5.66 million tons, up 1.15 million tons from a year ago and the highest output since 1984. Oilseed production hit 16.38 million tons, up 2 percent from last year, while sugar and flue-cured tobacco output reached record levels. Pork, beef, and mutton output totaled 26.39 million tons, up 5 percent and marine products amounted to 13.20 million tons, up 7 percent from a year ago.

CHINA: COTTON PRODUCTION AND AREA UP SIGNIFICANTLY

The Chinese Government has revised 1991/92 cotton production and area figures upward to 26.0 million bales and 6.35 million hectares, respectively, according to the U.S. agricultural counselor in Beijing. This is China's second-largest cotton crop and reflects a near-record yield and a significant increase in area from a year ago. Shandong province had the highest area and production in 1991, while Xinjiang, Sichuan, and Henan provinces reported the highest yields. Although the cotton crop in the Yangtze River valley was hit hard by flooding last summer, farmers in the region later expanded their plantings of late cotton. Yields were boosted by favorable weather throughout the fall of 1991.

CHINA: GLOBAL WARMING THREATENS AGRICULTURE PRODUCTION

A report by China's State Planning Commission, prepared for an upcoming United Nations conference on the environment, states that the current rise in global temperature will increase the instability of China's agricultural production and disrupt economic development in coastal areas. This scenario states that, although the warmer temperatures will help prolong the growth period of crops in cooler regions, they will also speed up evaporation of surface water and increase the aridity of farmland in China's north and northwest regions. Rising temperatures also may increase the occurrence of plant diseases and insect pests and cause a shift in the distribution of some plants and animals. The scientists speculate that global warming will raise the sea level by 20 centimeters by the year 2030 and 65 centimeters by the end of the next century. As a result, China's coastal cities will be more vulnerable to typhoons and flooding, and agricultural production along the coast may decline due to salt water intrusion.

COLOMBIA: POULTRY AND EGG PRODUCTION UP IN 1991

Colombian broiler meat output in 1991 is estimated at 294,000 tons, up 5 percent from 1990, but well below the 1988 record of 309,000 tons, according to the U.S. agricultural attache in Bogota. Production was below the record 1988 outturn in both 1989 and 1990 as producers attempted to match output with demand. Prices strengthened in 1991 due to rapid price increases for other types of meats and health concerns regarding red meat. Current assessments indicate broiler production will expand approximately 1 percent in 1992.

Egg production in 1991 is estimated at 5.2 billion eggs, a 4-percent increase over 1990. February 1992 egg prices were 30 percent above the February 1991 level, high enough to potentially generate a 2-percent production increase in 1992. Because of the higher prices, eggs are being imported from Venezuela and Ecuador. This is expected to moderate further price increases in 1992.

FRANCE: INCREASED AREA SOWN TO SUPERIOR QUALITY WHEAT VARIETIES

The U.S. agricultural counselor in Paris reported that in 1991 French wheat area for the second consecutive year has shown a shift from feed wheat varieties to superior quality bread wheat varieties. The counselor indicated that, even with the shift to superior quality varieties, the French milling industry still complains that the number of approved varieties is barely enough to meet domestic milling standards. The annual French wheat quality survey places wheat in three basic categories: superior, standard, and feed. Superior quality bread wheat varieties produce wheat of consistently good baking value; standard varieties are also used for baking, but vary in quality depending on the region and year grown. Feed wheat is used for animal consumption.

According to the survey, area planted to superior varieties grew to 41 percent of total wheat area in 1991, an increase of 10 percent from last year. The variety, Soissons, is now the number one French variety, having increased from 1 percent of the total wheat area in 1989 to 20 percent of the total area in 1991. Further expansion of the area planted to the Soissons variety is expected in 1992 due to its superior performance and higher yields.

The area devoted to both standard and feed quality varieties declined 5 percent from last year to 40 and 18 percent, respectively, of total wheat area. The shift away from standard and feed to superior varieties is especially noticeable in the Loire Valley and Aquitaine. In western France and Champagne, feed varieties constitute the bulk of the harvest. The popular standard variety, Thesee, accounted for about 18 percent of the 1991 harvested area, down 4 percent from last year. However, many French millers refuse to buy Thesee due to its poor quality. For the 1992 harvest, Thesee is expected to continue its decline as farmers look toward other standard varieties that meet millers specifications.

EGYPT: FARMGATE PRICE SHORT OF COMMITMENT

The U.S. agricultural counselor in Cairo reports that the Egyptian Ministry of Agriculture recently announced that farmgate prices for raw cotton will be increased by an average of US\$9/kentar for the 1992/93 crop (1 kentar = 157.5 kgs.). With this increase, Egypt will fall short of its commitment to establish domestic cotton prices at 66 percent of the international market level for the 1992 crop.

INDONESIA: RICE PLANTING FOR 1992/93 COMPLETED

Rice planting for the 1992/93 season is complete, and some harvesting of earlier planted rice has begun, according to the U.S. agricultural counselor in Jakarta. Although planting was delayed due to uneven intensity and distribution of rainfall across the strategic growing area of the north coast of Java, near-to-above-normal rainfall during January and February allowed farmers finish planting. Reservoirs are currently being replenished; however, pool levels are still reported lower than last year. A recharge of these reservoirs is essential to sustain minor season production.

The Government is trying to encourage increased production by focusing on raising rough rice prices, pre-positioning fertilizer, and supplying more efficient mechanical threshers to the primary producing areas. In addition, several Indonesian conglomerates have responded to the Government's recent appeal for assistance in expanding rice area. The objective is to enhance Indonesia's ability to remain self-sufficient in rice and further develop crop areas in northern and southern Sulawesi, Aceh, North Sumatra, and Lampung. These areas are much less developed for rice production than Java, the principal growing area, and would require considerable investment. It is doubtful this program will have an affect on 1992/93 production, since the main season rice crop is already planted and the relationship between conglomerates and small-scale farmers has yet to be finalized.

KOREA: PRODUCTION OF POULTRY MEAT AND FEED UP IN 1991

Korea's poultry meat production totaled just over 200,000 tons in 1991, an increase of nearly 12 percent over 1990, according to the U.S. agricultural counselor in Seoul. Favorable prices, particularly during the first part of the year, precipitated the increase. Over-production of broilers resulted in low prices around mid-year, but with relatively stable prices for pork, both broiler prices and numbers were trending upward by the end of the year. Output of commercially prepared poultry feed in 1991 was up 10 percent, to 3.6 million tons.

MEXICO: STRAWBERRY SITUATION

Mexico's 1991/92 fresh strawberry crop is forecast at 67,500 tons, down 33 percent from last season, according to the U.S. agricultural counselor in Mexico City. Production of frozen strawberries is expected to be about 30,000 tons, approximately two-thirds of last year's level. The sharp declines are primarily due to unseasonably cold weather and heavy rainfall in the major growing areas from late December through early February, a period of peak harvest activity. Because of the inclement weather, yields are expected to average 15 tons per hectare, well below the normal average of 18 tons. In Michoacan, the state most affected by the adverse weather, strawberry yields are expected to reach only 12 tons per hectare. Other factors contributing to the decline include the gradual shift of area away from strawberries to vegetables yielding higher returns, production costs in excess of farmgate prices, and Government restrictions on strawberry production in areas where the crop might be contaminated by polluted water supplies.

STRAWBERRIES: FRESH AND FROZEN

Year	Area Harvested (Hectares)	Yield (Tons/Hectare)	Fresh Production (Metric tons)	Frozen Production (Metric tons)
1970/71	6,903	14.98	103,440	N/A
1971/72	5,682	15.53	88,228	N/A
1972/73	6,661	15.72	104,684	N/A
1973/74	6,339	16.24	102,958	N/A
1974/75	5,328	16.44	87,618	N/A
1975/76	5,684	15.71	89,321	N/A
1976/77	5,529	15.98	88,327	N/A
1977/78	5,709	15.50	88,502	N/A
1978/79	5,340	16.38	87,450	N/A
1979/80	5,200	15.94	82,900	N/A
1980/81	4,400	17.50	77,000	38,000
1981/82	3,900	16.33	63,700	37,300
1982/83	3,800	20.24	76,900	33,000
1983/84	4,200	22.02	92,500	40,000
1984/85	3,500	19.00	66,500	25,554
1985/86	4,000	17.00	68,000	28,052
1986/87	4,750	19.14	90,900	39,753
1987/88	5,600	20.00	112,000	51,408
1988/89	6,000	16.00	96,000	30,000
1989/90	6,300	18.00	113,400	45,000
1990/91	6,200	16.13	100,000	47,000
1991/92 <u>1/</u>	4,500	15.00	67,500	30,000

1/ Preliminary.

PAKISTAN: RECORD COTTON HARVEST IN 1991/92

Pakistan has harvested a record 1991/92 cotton crop, according to the U.S. agricultural attache in Islamabad. As of March 1, 1992, cotton ginners had recorded cotton arrivals totaling 9.2 million 480-pound bales, up nearly 30 percent over arrivals the same time last year. The unexpectedly large crop is likely to tax the absorption capacity of both domestic mills and export markets. A signal that raw cotton output was above expectations came in early January, when cotton ginners closed their doors to continuing arrivals. They cited a huge glut of raw cotton which was non-marketable without Government intervention and was contributing to deteriorating domestic prices. Ginners lobbied the Government to ensure surplus cotton would be purchased by public sector agencies. In February, the Government finally ordered the Cotton Export Corporation to procure all production in excess of ginners' needs.

The 1991/92 cotton crop benefited from a host of factors, including near ideal growing conditions. Cotton returns continue to influence growers' attitudes toward cotton and prices were especially favorable at planting this year. A new cotton variety, S-12, reportedly made a significant contribution to the record crop yield this season. Cultivation of S-12 has spread rapidly since it was first introduced in 1988. Cultivated area devoted to S-12 grew to 70 percent of total area in Punjab Province this season, up from 38 percent in 1990/91 and 19 percent in 1989/90. Pesticide usage was higher and more widespread this year and pest outbreaks were significantly lower. While the Pakistani crop is totally irrigated, the well-spaced summer rainfall provided an added boost to the crop.

PORTUGAL: DRY WEATHER THREATENS 1992/93 PRODUCTION PROSPECTS

Exceptionally dry weather since September 1991 is now being described as "a once-in-twenty year phenomena" that is threatening 1992/93 crop prospects, according to the U.S. agricultural attache in Lisbon. Although winter grain planted area is up 10 to 20 percent from 1991/92, substantial rainfall is needed soon to replenish soil moisture and reservoir levels. If water levels remain low, irrigated rice area is expected to fall by as much as 30 percent, or 10,000 hectares, from the previous year. Since practically all annual rainfall occurs between October and April, this decline in rice area may be made up by an expansion in corn plantings, which require less water. Continued drier-than-normal weather may cause producers to plant drought-tolerant sunflowerseed in abandoned winter grain areas and areas normally planted to other spring crops.

RUSSIA: 1992 OUTPUT PROJECTIONS

The U.S. agricultural counselor in Moscow reported the following Ministry of Economics and Finance projections for production of agricultural commodities in 1992. These projections were published in late January and early February and cover only the Russian Federation.

<u>Commodity</u>	<u>1992 Production (Million tons)</u>	<u>Percent of 1991 Production</u>
Grain	98.0	110
Sugarbeets	29.0	119
Sunflowerseed	3.2	110
Potatoes	36.0	106
Vegetables	10.7	102
Milk	47.0	90
Eggs	42.0 (billion eggs)	90

THAILAND: RICE CROP SEEN AT ABOVE AVERAGE LEVEL

The U.S. agricultural attache in Bangkok recently completed a survey of the main season rice crop in Thailand's upper and lower northeast, upper north, and central plains regions and filed the following report. Thailand's 1991/92 rice crop (milled basis) remains unchanged this month at 13.2 million tons, 15 percent higher than last year and 5 percent above the 5-year average. This year, yields are estimated at 1.32 tons per hectare or 2 percent above the 5-year average. The main season crop, whose harvest is nearing completion, is estimated at 11.55 million tons. The second crop, for which planting started in January, is placed at 1.65 million tons.

Main season rice production in the upper northeast region is expected to be slightly below average because late rains resulted in planting delays and damaged nursery stock. This year, unlike last season, there have been no significant brown planthopper problems in the region. In the lower northeast, production is expected to be slightly above average. Good rainfall offset the dryness in provinces that did not receive significant rain from Typhoon Fred. In the upper north, on the other hand, production is expected to be slightly below average, since dryness delayed planting or necessitated replanting. Some producers switched to shorter cycle varieties to offset the delay. Production is also expected to be above average in the central plains where planting delays were similar to those experienced in the north and northeast regions. Good monsoon rains in early August and continued timely precipitation throughout the season provided adequate moisture for the crop. Insect damage was minimal due to increased surveying and rapid pesticide application.

There is some uncertainty concerning the size of the second season rice crop. Government extension officials are encouraging farmers to plant less rice because of low reservoir levels. Officials also stress that they will be more stringent this year in controlling the release of irrigation water.

WORLD: SUGAR PRODUCTION REVISED DOWNWARD

World 1991/92 centrifugal sugar production has been revised downward to 111.3 million tons (raw basis), 1.3 million less than the world total published in December 1991 and 1.9 million below the 1990/91 outturn of 113.2 million. The most significant single country declines occurred in the republics of the former USSR, down 1.7 million tons to 7.0 million, and in Cuba, down 1.3 million tons to 6.0 million.

Partially offsetting these reductions are projected increases in Thailand, up 600,000 tons to 5.0 million; Brazil, up 480,000 tons to 9.0 million; the European Community, up 375,000 tons to 15.8 million; and China, up 200,000 tons to 7.2 million.

WORLD LIVESTOCK AND MEAT PRODUCTION

World red meat production for 1992 is estimated at 118.8 million tons (carcass weight equivalent), down 2.5 million from the September 1991 forecast and 249,000 tons below the revised 1991 estimate. Beef production is estimated at 47.9 million tons, about 1.1 million less than the September forecast and 436,000 tons below the revised 1991 estimate. Much of the decrease in the 1992 world total, since September, reflects reductions in beef production in Brazil, China, and the republics of the former USSR.

Pork production is estimated at 64.6 million tons, 1.4 million below the September forecast, but 201,000 tons above the revised 1991 estimate. The change was largely due to reductions in Chinese and former Soviet production that more than offset increases in the United States, the European Community, Taiwan, and South Korea.

Sheep and goat meat production is estimated at 6.3 million tons, down slightly from the September estimate and unchanged from the 1991 level.

As of January 1992, cattle numbers were estimated at 1,052.6 million head, down approximately 8.9 million from the September forecast and 6.5 million below the 1991 starting numbers. The major changes since the September forecast reflect reductions in Chinese and U.S. herd growth.

At the start of 1992, hog inventories were estimated at 755.8 million head, down 11.8 million from the September forecast and 5.8 million below the 1991 starting numbers. Smaller than expected herd growth in China and the United States and herd culling in the republics of the former USSR accounted for most of the reduction.

Sheep and goat inventories at the beginning of 1992 were estimated at 852.1 million head, down 1.8 million from the September forecast and 27.6 million below starting inventories in 1991. The major change, since September, is a 2.7 million head increase in China's sheep and goat inventory.

WORLD RED MEAT PRODUCTION
(Million tons - carcass weight equivalent)

	1989	1990	1991	1992 <u>1/</u>	1992 <u>2/</u>
Beef and veal	48.4	48.9	48.3	49.0	47.9
Pork	63.5	64.8	64.4	66.0	64.6
Sheep and goat meat	6.0	6.3	6.3	6.4	6.3
Total*	117.9	119.9	119.1	121.3	118.8

*Note: These totals do not add due to rounding.

1/ September 1991 Forecast

2/ March 1992 Revised Forecast

Beef production in North America for 1992 is forecast at 13.3 million tons, marginally above the September 1991 forecast and 2 percent above the 1991 level. The 1992 beef production forecast for the United States is approximately 10.8 million tons, up 2 percent from 1991. Herd growth was slightly over 1 percent during 1991, somewhat smaller than the 3 percent increase projected in September. The 1991 inventory was revised downward and the calf crop was smaller than indicated in the mid-year survey. The 1992 forecast for Canadian beef production has been changed to 895,000 tons, down from the September estimate of 915,000 but 2 percent above the revised 1991 level. In Mexico, beef production for both 1991 and 1992 has been revised upward. Production in 1992 is expected to total 1.6 million tons, 1 percent above the 1991 level. Mexico's starting inventory for 1992 has been revised upward to 30.2 million head, about 1 percent above the September forecast. Herd expansion, which began in early 1991, is expected to continue throughout 1992 because of favorable weather and improved economic conditions.

In Brazil, beef production for 1992 is forecast at 3.8 million tons. This is down from the September estimate of 4.3 million tons and reflects continuing stagnation in the domestic economy. Beef production in Argentina during 1992 is expected to total 2.6 million tons, slightly below the September estimate, due to an unforeseen reduction in cattle slaughter. Argentina's current economic stability, abundant pastureland, and favorable cattle prices are expected to encourage herd rebuilding for the first time since 1984.

EC beef production is forecast at 8.3 million tons, 4 percent below the revised 1991 production level of 8.6 million tons. The 1991 revision was due largely to herd culling in the eastern regions of Germany. In Poland, 1992 beef production is expected to total 654,000 tons, down from 726,000 tons in 1991 due to low carcass weights. Poland's 1992 starting inventories are estimated at 8.0 million head, down 994,000 from 1991. In the republics of the former USSR, 1992 beef production is expected to be down 6 percent from last year, to 7.7 million tons. Since the September forecast, starting inventories for 1992 have been revised upward by 400,000 head due to a reduction in the 1991 slaughter that cut projected 1991 beef production to 8.2 million tons.

Chinese beef production for 1992 is estimated at 1.5 million tons, down 110,000 from the September estimate, but 9 percent above 1991 due to increased slaughter. Japanese beef production for 1992 is projected at 590,000 tons, 3 percent above 1991 due to increased Wagyu carcass weights. The Wagyu is a native beef breed famous for highly marbled meat.

The 1991 and 1992 Australian beef production estimates have been revised upward by 2 and 3 percent, respectively. The changes reflect increased slaughter in both years and higher carcass weights in 1992. Herd growth has been slow due to uncertain economic prospects and fluctuating weather conditions.

Pork production in selected countries for both 1991 and 1992 has been revised downward from the September forecasts. Production for 1991 is down 200,000 tons to 64.4 million. The 1992 projection has been cut 2 percent, to 64.6 million tons. Production for 1992 in the United States has been revised upward 3 percent from the September forecast, to 7.8 million tons. This change is based on a projected increase in the hog slaughter and continued high carcass weights.

EC pork production for 1992 is expected to remain essentially unchanged from the 1991 level of 13.7 million tons. Poland's 1991 pork production estimate has been reduced 2 percent below the September forecast because of lower carcass weights and reduced slaughter. During 1991, hog numbers expanded 5 percent due to favorable hog-feed price ratios. Because hog prices are down, hog numbers are projected to decline in 1992 elevating production to a 5-year high of 2.2 million tons. Yugoslavia's 1992 starting inventories are down 4 percent from both the September forecast and 1991 primarily due to the civil war in Croatia. Pork production for 1991 is estimated at 720,000 tons. The 1992 forecast is only slightly higher at 740,000 tons. Pork production for 1992 in the republics of the former USSR is forecast at 5.5 million tons, down 7 percent from the September forecast and 10 percent below the 1991 level. The decline reflects projected shortages of feed supplies and low producer returns.

In China, hog numbers at the start of 1992 were down 4 million head from the September projection and slightly below starting 1991 inventories. Chinese pork production for both 1991 and 1992 has been revised downward to 23.0 and 23.1 million tons, respectively. The slow growth is due to declining hog prices and last year's floods that reduced breeding hog inventories. Korea's 1992 pork production is forecast at 610,000 tons, 24 percent greater than the September forecast and 15 percent above the 1991 estimate. At the beginning of 1992, Korean hog numbers were estimated at a record 5.0 million head, up 11 percent from a year ago. This increase reflects strong domestic demand for pork and projected stable prices. Pork production in Japan is expected to be down 3 percent in 1992, to 1.5 million tons, because of herd reductions and a smaller pig crop. The April 1992 census is expected to show Japanese hog numbers at 10.8 million head, down 700,000 from the September estimate, and 5 percent below 1991. This decline is due to small and medium-sized farmers leaving the industry because of increased pollution control costs. In Taiwan, pork production for 1992 is estimated at 1.2 million tons, up 18 percent from the September forecast and 8 percent above the 1991 level because of expanded exports to the Japanese market. High export prices have encouraged farmers to expand inventories to record levels. The Government has encouraged this growth by not enforcing previously announced pollution controls on hog farms.

Sheep meat production in selected countries is expected to total 6.3 million tons in 1992, marginally below both the September forecast and the revised estimate for 1991. In Australia, production estimates for sheep and lamb meat for 1991 and 1992 have been reduced to 625,000 and 638,000 tons, respectively, because of the smaller lamb crop in both years. Starting inventories are also down due to high death losses among wool sheep (i.e. sheep too old to be slaughtered for meat) because of unfavorable wool prices and large surplus wool stocks.

New Zealand's 1992 starting inventories have been revised downward only slightly to 57.7 million head. To date, weather conditions have been favorable throughout the country and pastures are in good condition. Sheep meat production for 1992 is forecast at 526,000 tons, up 5 percent from the September forecast, but marginally below production in 1991. Meat production and live sheep trade is of greater significance in the New Zealand sheep industry than in the more wool-dominated Australian industry. This would account for the reduced volume of culling in the New Zealand industry.

China's 1992 production of sheep meat is estimated at 1.2 million tons, unchanged from the September forecast, but 6 percent above 1991. Sheep and goat numbers for 1991 were revised downward to 210.0 million head. The 1992 starting inventory has been revised from 205.7 to 208.4 million head due to a smaller than expected slaughter rate in 1991.

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TABLE 9

WORLD RED MEAT PRODUCTION 1/

(1,000 Metric tons—carcass weight equivalent)

	1989	1990	1991	1992 1/	1992 2/
Canada	2,164	2,057	1,989	2,120	2,035
Mexico	3,125	2,658	2,478	2,460	2,505
United States	17,963	17,594	17,953	18,399	18,501
NORTH AMERICA	23,252	22,309	22,420	22,979	23,041
Costa Rica	81	85	91	90	90
Dominican Republic	74	64	66	69	69
El Salvador	27	27	28	30	30
Guatemala	75	73	67	66	66
Honduras	24	23	22	22	22
CENT AMER & CARIBBEAN	281	272	274	277	277
Argentina	2,696	2,738	2,725	2,667	2,647
Brazil	4,750	4,650	4,800	5,400	5,050
Colombia	881	936	960	971	971
Peru	112	116	104	100	100
Uruguay	376	349	280	285	285
Venezuela	469	481	471	467	467
SOUTH AMERICA	9,284	9,270	9,340	9,890	9,520
Belgium/Luxembourg	1,150	1,100	1,286	1,185	1,278
Denmark	1,372	1,411	1,469	1,479	1,537
France	3,670	3,816	3,880	3,940	3,940
Germany	6,006	6,111	5,575	5,198	5,043
Greece	363	359	357	355	355
Ireland	639	755	809	829	824
Italy	2,515	2,583	2,604	2,584	2,574
Netherlands	2,134	2,198	2,223	2,208	2,224
Portugal	364	383	383	382	382
Spain	2,404	2,537	2,580	2,530	2,635
United Kingdom	2,326	2,331	2,390	2,404	2,384
EUROPEAN COMMUNITY	22,943	23,584	23,556	23,094	23,176
Austria	617	629	635	627	627
Finland	280	303	302	290	290
Sweden	447	438	424	415	415
Switzerland	437	434	430	435	435
OTHER WEST EUROPE	1,781	1,804	1,791	1,767	1,767
Bulgaria	638	636	596	616	616
Czechoslovakia	1,458	1,406	1,295	1,294	1,294
Hungary	1,191	1,084	1,008	829	829
Poland	2,621	2,736	2,844	2,892	2,859
Romania	882	1,080	958	881	868
Yugoslavia	1,169	1,218	1,105	1,160	1,113
EAST EUROPE	7,959	8,160	7,806	7,672	7,579
Fmr. USSR 2/	16,500	16,460	15,700	15,150	15,150
Israel	39	40	38	37	37
Saudi Arabia	25	28	30	40	40
Turkey	645	655	665	710	675
MIDDLE EAST	709	723	733	787	752
Egypt	464	489	502	508	493
South Africa	784	899	914	927	927
AFRICA	1,248	1,388	1,416	1,435	1,420
China	23,262	25,151	25,513	27,410	25,800
Hong Kong	30	20	18	19	19
India	2,407	2,438	2,480	2,468	2,468
Korea, South	731	681	660	626	778
Japan	2,142	2,104	2,063	2,080	2,040
Philippines	747	797	819	841	841
Singapore	75	76	77	79	79
Taiwan	923	1,014	1,120	1,025	1,205
ASIA	30,317	32,281	32,750	34,548	33,230
Australia	2,452	2,683	2,625	2,657	2,672
New Zealand	1,168	1,014	1,103	1,065	1,115
OCEANIA	3,620	3,697	3,728	3,722	3,787
TOTAL	117,894	119,948	119,514	121,321	119,699

1/ Includes Beef, veal, pork and goat meat. 2/ Forecast September 1991. 3/ Revised March 1992.

4/ Fmr USSR covers the same area previously designated USSR.

MARCH 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10
BEEF AND VEAL PRODUCTION, SELECTED COUNTRIES
(1,000 Metric tons—carcass weight equivalent)

	1989	1990	1991	1992 1/	1992 2/
Canada	980	924	879	915	895
Mexico	2,140	1,790	1,580	1,555	1,600
United States	10,633	10,464	10,530	10,689	10,760
NORTH AMERICA	13,753	13,178	12,989	13,159	13,255
Costa Rica	81	85	91	90	90
Dominican Republic	60	51	52	54	54
El Salvador	27	27	28	30	30
Guatemala	61	59	53	52	52
Honduras	24	23	22	22	22
CENT AMER & CARIBBEAN	253	245	246	248	248
Argentina	2,600	2,650	2,640	2,580	2,560
Brazil	3,800	3,600	3,700	4,250	3,840
Colombia	741	795	823	839	839
Peru	112	116	104	100	100
Uruguay	376	349	280	285	304
Venezuela	337	382	370	362	362
SOUTH AMERICA	7,966	7,892	7,917	8,416	8,005
Belgium/Luxembourg	312	323	379	332	358
Denmark	205	202	212	207	210
France	1,670	1,753	1,800	1,850	1,850
Germany	1,963	2,112	2,200	1,950	1,850
Greece	82	82	80	76	76
Ireland	432	514	550	564	552
Italy	1,140	1,165	1,200	1,165	1,165
Netherlands	485	521	595	540	580
Portugal	131	114	108	110	110
Spain	451	513	490	480	490
United Kingdom	980	1,003	1,013	1,034	1,009
EUROPEAN COMMUNITY	7,851	8,302	8,627	8,308	8,250
Austria	213	223	230	222	222
Finland	107	117	118	108	108
Sweden	139	145	149	146	146
Switzerland	157	164	165	167	167
OTHER WEST EUROPE	616	649	662	643	643
Bulgaria	136	137	126	126	126
Czechoslovakia	488	454	391	390	390
Hungary	108	110	111	100	100
Poland	729	838	726	690	654
Romania	210	370	280	230	205
Yugoslavia	309	352	320	303	310
EAST EUROPE	1,980	2,261	1,954	1,839	1,785
Fmr. USSR 3/	8,800	8,814	8,160	8,300	7,700
Israel	39	40	38	37	37
Saudi Arabia	25	28	30	40	40
Turkey	270	285	300	350	315
MIDDLE EAST	334	353	368	427	392
Egypt	386	408	420	425	410
South Africa	582	661	678	691	691
AFRICA	968	1,069	1,098	1,116	1,101
China	1,072	1,256	1,370	1,610	1,500
India	1,847	1,868	1,901	1,883	1,883
Korea, South	124	131	130	135	165
Japan	548	549	573	575	590
Philippines	132	132	129	131	131
Taiwan	6	5	5	5	5
ASIA	3,729	3,941	4,108	4,339	4,274
Australia	1,565	1,718	1,675	1,645	1,699
New Zealand	550	471	532	521	548
OCEANIA	2,115	2,189	2,207	2,166	2,247
TOTAL	48,365	48,893	48,336	48,961	47,900

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR.

TABLE 11
PORK PRODUCTION, SELECTED COUNTRIES
(1,000 Metric tons–carcass weight equivalent)

	1989	1990	1991	1992 1/	1992 2/
Canada	1,184	1,133	1,110	1,205	1,140
Mexico	910	792	820	825	825
United States	7,173	6,965	7,258	7,543	7,758
NORTH AMERICA	9,267	8,890	9,188	9,573	9,723
Brazil	950	1,050	1,100	1,150	1,150
Colombia	140	141	137	132	132
Dominican Republic	14	13	14	15	15
Guatemala	14	14	14	14	14
Venezuela	132	99	101	105	105
CENTRAL & SO AMERICA	1,250	1,317	1,366	1,416	1,416
Belgium/Luxembourg	831	770	901	847	914
Denmark	1,165	1,207	1,255	1,270	1,325
France	1,840	1,870	1,890	1,900	1,900
Germany	4,001	3,949	3,325	3,200	3,150
Greece	151	147	151	152	152
Ireland	144	159	170	168	179
Italy	1,295	1,333	1,320	1,330	1,320
Netherlands	1,636	1,661	1,610	1,650	1,625
Portugal	216	243	244	244	244
Spain	1,722	1,788	1,850	1,800	1,900
United Kingdom	978	957	987	996	1,005
EUROPEAN COMMUNITY	13,979	14,084	13,703	13,557	13,714
Austria	404	406	405	405	405
Finland	173	186	184	182	182
Sweden	308	293	275	269	269
Switzerland	280	270	265	268	268
OTHER WEST EUROPE	1,165	1,155	1,129	1,124	1,124
Bulgaria	424	422	400	420	420
Czechoslovakia	960	942	894	894	894
Hungary	1,079	970	893	725	725
Poland	1,870	1,870	2,085	2,185	2,185
Romania	600	620	600	575	590
Yugoslavia	791	799	720	790	740
EAST EUROPE	5,724	5,623	5,592	5,589	5,554
Fmr. USSR	6,700	6,646	6,150	5,950	5,550
China	21,228	22,811	23,009	24,600	23,100
Hong Kong	30	20	18	19	19
Korea, South	606	550	530	490	610
Japan	1,594	1,555	1,490	1,505	1,450
Philippines	615	665	690	710	710
Singapore	75	76	77	79	79
Taiwan	917	1,009	1,115	1,020	1,200
ASIA	25,065	26,686	26,929	28,423	27,168
Australia	302	319	325	335	335
New Zealand	44	43	42	41	41
OCEANIA	346	362	367	376	376
TOTAL	63,496	64,763	64,424	66,008	64,625

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR.

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 12
SHEEP INVENTORIES, SELECTED COUNTRIES

(1,000 Head-January 1)

	1989	1990	1991	1992 1/	1992 2/
United States	10,858	11,363	11,200	10,850	10,850
Argentina	29,345	28,571	27,552	26,506	25,706
Belgium/Luxembourg	156	158	163	163	163
Denmark	86	100	111	125	125
France	11,500	11,500	11,500	11,595	11,295
Germany	4,098	4,136	3,239	2,879	2,521
Greece	10,694	10,150	9,759	9,694	9,694
Ireland	4,991	5,782	6,001	6,236	6,236
Italy	11,623	11,695	11,575	11,594	11,775
Netherlands	1,405	1,702	1,878	1,810	1,900
Portugal	3,187	3,347	3,413	3,543	3,547
Spain	23,797	25,447	24,037	25,000	24,500
United Kingdom	29,045	29,521	29,954	29,925	30,043
EUROPEAN COMMUNITY	100,582	103,538	101,630	102,564	101,799
Bulgaria	8,593	7,988	7,309	7,241	7,241
Czechoslovakia	1,047	1,051	1,087	1,087	1,087
Hungary	2,216	2,069	1,865	1,723	1,723
Poland	4,300	4,196	3,798	3,200	2,900
Romania	16,210	15,442	13,886	14,830	13,466
Yugoslavia	7,564	7,596	7,431	7,500	7,264
EAST EUROPE	39,930	38,342	35,376	35,581	33,681
Fmr. USSR 3/	140,684	138,400	133,300	128,300	128,000
Egypt	3,451	3,534	3,554	3,439	3,439
South Africa	30,935	32,665	32,580	32,500	32,500
AFRICA	34,386	36,199	36,134	35,939	35,939
India	46,216	47,277	48,248	48,178	48,178
Turkey	45,700	45,300	45,000	44,600	44,600
MIDDLE EAST	91,916	92,577	93,248	92,778	92,778
Australia	171,292	177,841	173,396	157,900	157,222
New Zealand	64,600	60,569	57,852	57,786	57,740
OCEANIA	235,892	238,410	231,248	215,686	214,962
TOTAL	683,593	687,400	669,688	648,204	643,715
China	201,527	211,642	210,021	205,700	208,424
TOTAL	885,120	899,042	879,709	853,904	852,139

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR. 4/ Includes goats in China.

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 13

LAMB, MUTTON, GOAT MEAT PRODUCTION, SELECTED COUNTRIES

(1,000 Metric tons- carcass weight equivalent)

	1989	1990	1991	1992 1/	1992 2/
Mexico	75	76	78	80	80
United States	157	165	165	167	165
NORTH AMERICA	232	241	243	247	245
Argentina	96	88	85	87	87
Belgium/Luxembourg	7	7	6	6	6
Denmark	2	2	2	2	2
France	160	193	190	190	190
Germany	42	50	50	48	43
Greece	130	130	126	127	127
Ireland	63	82	89	97	93
Italy	80	85	84	89	89
Netherlands	13	16	18	18	19
Portugal	28	28	28	28	28
Spain	231	236	240	250	245
United Kingdom	368	371	390	374	370
EUROPEAN COMMUNITY	1,124	1,200	1,223	1,229	1,212
Bulgaria	78	77	70	70	70
Czechoslovakia	10	10	10	10	10
Hungary	4	4	4	4	4
Poland	22	28	33	17	20
Romania	72	90	78	76	73
Yugoslavia	69	67	65	67	63
EAST EUROPE	255	276	260	244	240
Fmr. USSR 3/	1,000	1,008	965	900	900
Egypt	78	81	82	83	83
South Africa	202	238	236	236	236
AFRICA	280	319	318	319	319
China	962	1,068	1,134	1,200	1,200
India	560	570	579	585	585
Korea, South	1	0	0	1	0
Turkey	375	370	365	360	360
MIDDLE EAST & ASIA	1,898	2,008	2,078	2,146	2,145
Australia	585	646	625	677	638
New Zealand	574	500	529	503	526
OCEANIA	1,159	1,146	1,154	1,180	1,164
TOTAL	6,044	6,286	6,326	6,352	6,312

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR.

TABLE 14

CATTLE AND BUFFALO INVENTORIES, SELECTED COUNTRIES

(1,000 Head-January 1)

	1989	1990	1991	1992 1/	1992 2/
Canada	11,016	11,147	11,198	11,400	11,400
Mexico	34,999	31,747	29,847	29,887	30,157
United States	98,065	98,162	98,896	102,690	100,110
NORTH AMERICA	144,080	141,056	139,941	143,977	141,667
Costa Rica	1,735	1,762	1,762	1,741	1,741
Dominican Republic	1,990	1,986	1,977	1,976	1,976
El Salvador	1,162	1,220	1,242	1,285	1,285
Guatemala	2,100	1,900	1,695	1,532	1,532
Honduras	2,457	2,424	2,388	2,356	2,356
CENT AMER & CARIBBEAN	9,444	9,292	9,064	8,890	8,890
Argentina	50,782	50,582	50,080	50,079	50,029
Brazil	130,500	130,850	131,275	130,700	130,700
Colombia	17,627	16,835	16,225	16,145	16,145
Peru	4,000	3,800	3,630	3,510	3,510
Uruguay	10,548	9,377	9,431	10,058	10,058
Venezuela	13,095	13,210	13,368	13,648	13,648
SOUTH AMERICA	226,552	224,654	224,009	224,140	224,090
Belgium-Luxembourg	3,174	3,259	3,378	3,382	3,267
Denmark	2,226	2,232	2,241	2,200	2,222
France	20,120	19,980	19,886	19,926	19,926
Germany	20,369	20,287	19,488	18,108	17,215
Greece	723	687	634	616	616
Ireland	5,637	5,899	6,029	6,180	6,180
Italy	8,843	8,853	8,578	8,222	8,104
Netherlands	4,606	4,731	4,830	5,000	4,900
Portugal	1,359	1,291	1,281	1,336	1,333
Spain	5,200	5,331	5,126	5,000	5,000
United Kingdom	11,902	11,922	11,846	11,821	11,698
EUROPEAN COMMUNITY	84,159	84,472	83,317	81,791	80,461
Austria	2,541	2,562	2,584	2,513	2,513
Finland	1,379	1,363	1,315	1,292	1,292
Sweden	1,676	1,697	1,660	1,612	1,612
Switzerland	1,850	1,855	1,829	1,827	1,827
OTHER WEST EUROPE	7,446	7,477	7,388	7,244	7,244
Bulgaria	1,615	1,577	1,524	1,512	1,512
Czechoslovakia	5,075	5,129	4,923	4,838	4,838
Hungary	1,690	1,598	1,571	1,500	1,500
Poland	10,322	10,143	9,024	8,600	8,030
Romania	6,416	6,283	5,437	5,754	5,017
Yugoslavia	4,759	4,702	4,527	4,600	4,415
EAST EUROPE	29,877	29,432	27,006	26,804	25,312
Fmr. USSR 3/	119,580	118,400	115,700	112,000	112,400
Israel	191	190	186	184	184
Saudi Arabia	217	191	176	158	158
Turkey	13,400	12,700	12,200	11,700	11,700
MIDDLE EAST	13,808	13,081	12,562	12,042	12,042
Egypt	6,331	6,385	6,408	6,418	6,418
South Africa	12,675	13,398	13,512	13,585	13,585
AFRICA	19,006	19,783	19,920	20,003	20,003
China	97,948	100,752	102,884	108,500	104,214
India	267,620	270,150	272,710	271,437	271,437
Korea, South	2,039	2,051	2,126	2,220	2,269
Japan	4,682	4,760	4,863	4,878	4,917
Philippines	4,524	4,395	4,387	4,375	4,375
Taiwan	176	165	154	158	158
ASIA	376,989	382,273	387,124	391,568	387,370
Australia	23,938	24,673	25,027	24,800	25,075
New Zealand	8,058	7,828	8,065	8,235	8,085
OCEANIA	31,996	32,501	33,092	33,035	33,160
TOTAL	1,062,937	1,062,421	1,059,123	1,061,494	1,052,639

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR.

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 15

HOG INVENTORIES, SELECTED COUNTRIES

(1,000 Head-January 1

	1989	1990	1991	1992 1/	1992 2/
Canada	11,018	10,737	10,608	10,780	10,780
Mexico	9,003	8,563	8,593	9,193	9,863
United States	55,469	53,821	54,477	58,000	56,974
NORTH AMERICA	75,490	73,121	73,678	77,973	77,617
Brazil	31,700	33,200	32,500	33,100	33,100
Colombia	2,393	2,434	2,398	2,369	2,369
Dominican Republic	293	306	306	305	305
Guatemala	1,110	1,100	1,110	1,115	1,115
Venezuela	2,961	2,326	1,971	1,802	1,802
CENTRAL & SO AMERICA	38,457	39,366	38,285	38,691	38,691
Belgium/Luxembourg	6,306	6,510	6,341	6,421	6,554
Denmark	9,105	9,120	9,282	9,500	9,767
France	11,866	11,860	11,860	11,560	11,560
Germany	35,235	34,178	30,818	28,868	26,251
Greece	1,114	1,100	1,141	1,150	1,150
Ireland	961	999	1,069	1,099	1,099
Italy	9,360	9,261	9,119	9,050	9,005
Netherlands	13,820	13,638	13,788	13,600	13,000
Portugal	2,326	2,531	2,664	2,834	2,835
Spain	16,100	16,910	16,001	16,200	16,100
United Kingdom	7,626	7,383	7,379	7,423	7,490
EUROPEAN COMMUNITY	113,819	113,490	109,462	107,705	104,811
Austria	3,874	3,773	3,688	3,600	3,600
Finland	1,327	1,348	1,290	1,231	1,231
Sweden	2,264	2,264	2,170	2,143	2,143
Switzerland	1,869	1,787	1,723	1,678	1,678
OTHER WEST EUROPE	9,334	9,172	8,871	8,652	8,652
Bulgaria	4,132	4,352	4,340	4,390	4,390
Czechoslovakia	7,348	7,498	7,090	6,800	6,800
Hungary	8,327	7,660	8,000	7,400	7,400
Poland	19,605	18,685	19,739	21,500	20,722
Romania	14,350	11,659	12,066	15,000	11,940
Yugoslavia	7,396	7,231	7,358	7,360	7,050
EAST EUROPE	61,158	57,085	58,593	62,450	58,302
Fmr. USSR	78,143	78,409	75,583	73,000	71,200
China	342,218	352,810	362,410	365,000	361,000
Korea, South	4,852	4,801	4,528	4,558	5,046
Japan	11,866	11,816	11,335	11,500	10,800
Philippines	7,909	8,124	8,007	8,150	8,150
Taiwan	6,954	7,783	8,565	8,500	10,089
ASIA	373,799	385,334	394,845	397,708	395,085
Australia	2,766	2,765	1,881	1,076	1,076
New Zealand	414	380	395	405	405
OCEANIA	3,180	3,145	2,276	1,481	1,481
TOTAL	753,380	759,122	761,593	767,660	755,839

1/ Forecast September 1991. 2/ Revised March 1992. 3/ Fmr. USSR covers the same area previously designated USSR.

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

WORLD COCOA PRODUCTION

World cocoa bean production for 1991/92 (October-September) is estimated at 2.26 million tons, 4 percent below the October 1991 forecast of 2.35 million tons (WAP 10-91) and 10 percent less than last season. In Cote d'Ivoire, the world's largest producer, 1991/92 outturn is estimated at 710,000 tons, down 15,000 from the October forecast and 110,000 less than the 1990/91 harvest. Brazil, the world's second largest producer, is expected to harvest a 1991/92 crop of 300,000 tons, 35,000 less than the October forecast and 75,000 smaller than the 1990/91 harvest.

Cocoa output in Africa during the 1991/92 season is estimated at 1.2 million tons, down 8 percent from the October 1991 forecast and 15 percent below last year. In Cote d'Ivoire, the 1991/92 estimate was revised downward because of an anticipated decline in mid-crop production resulting from poor rainfall during September - December and the harsh dry harmattan conditions in December and January. Although the harmattan conditions were favorable for drying the main crop, the dry, dusty winds associated with it proved detrimental to mid-crop pod formation and caused flowers and young pods to fall.

Ghana's 1991/92 cocoa crop is estimated at 240,000 tons, down 14 percent from the October forecast and 18 percent less than last season. The sharp downturn during the past few months can be attributed to unseasonably wet weather and insufficient fungicide applications that resulted in a high incidence of black pod disease. Insecticide and fungicide distribution for the 1991/92 crop was hindered by washed-out secondary roads. This compounded the problem of low usage of these inputs caused, in part, by the Government's decision to disallow credit for inputs. The proposed privatization of the Ghana Cocoa Board (COCOBOD) is expected to affect grower prices in the future. Currently, COCOBOD sets farmgate prices (always at a level higher than international market prices), imposes strict quality controls, and is the sole buyer and exporter of Ghana's cocoa beans.

Cocoa production in Nigeria is estimated at 110,000 tons, down 33 percent from the October forecast and 31 percent below the 1990/91 level. An unusually long, rainy season encouraged the spread of black pod disease and capsid infestation. Sharply higher input prices forced growers to use chemicals sparingly; while little was applied, it was washed away by frequent rains. High farmgate prices vis-a-vis world market prices have dampened export activity during the 1991/92 season. Farmers have been able to maintain prices by holding beans off the market in the face of increased demand from local processors.

South America's 1991/92 cocoa production is estimated at 490,100 tons, down 3 percent from the October forecast and 13 percent below the volume harvested a year ago. The current estimate of the Brazilian crop is 10 percent less than the October forecast and 20 percent below the 1990/91 level. The Bahia main crop is estimated at 117,000 tons, while the temporao crop and production in other states are expected to total 183,000. The current main crop (October 1991 - April 1992) suffered drought damage and is expected to decline by 101,000 tons from the previous season.

The October estimate of Ecuador's 1991/92 cocoa crop has been increased by 25 percent to 100,000 tons, the same volume produced during the 1990/91 season. The upward revision reflects higher yields generated by extremely favorable weather conditions. Cocoa plantations benefited from timely and plentiful rain. Sunny, dry spells between rainfalls kept potential losses from fungus diseases at a minimum. The Government of Ecuador (GOE) is very concerned about cocoa quality and maintaining the flavor and aroma characteristics of Arriba beans. The GOE recently instituted a program that provides for premium payments for production of high quality cocoa beans and encourages better quality beans for export.

Cocoa production in North and Central America and the Caribbean is estimated at 104,500 tons for 1991/92, up 4 percent from last season. Production in the Dominican Republic is expected to total 47,000 tons, up 11 percent from last year. Mexico's 1991/92 crop is estimated at 39,000 tons, essentially unchanged from a year ago, but slightly below the previous 5-year average of 40,800 tons.

Cocoa production in Asia and Oceania during the 1991/92 season is expected to increase 7 percent over last year, to 454,300 tons. Malaysia, the largest cocoa producer in this region, is expected to harvest a 245,000 ton crop in 1991/92, up 4 percent from a year ago. The upturn reflects an increase in the number of mature trees as well as additional young trees entering the bearing stage. An upturn in domestic cocoa prices since August 1991, coupled with steady growth in global demand, has brightened the Malaysian industry's prospects for the remainder of the 1991/92 season. The Indonesian cocoa crop is estimated at 150,000 tons, a 15 percent increase over both the October forecast and the 1990/91 harvest, due to additional acreage coming into production.

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TABLE 16
WORLD COCOA BEAN PRODUCTION 1/
(1,000 Metric tons)

	1986/87-1990/91 AVERAGE	1989/90	1990/91	1991/92 OCTOBER	1991/92 MARCH
Costa Rica	4.0	4.6	3.5	3.3	3.3
Cuba	2.1	2.1	2.1	2.1	2.1
Dominican Republic	47.8	57.0	42.3	47.0	47.0
Grenada	2.0	2.0	2.0	2.0	2.0
Guatemala	2.0	2.0	2.0	2.0	2.0
Haiti	2.9	3.0	2.5	3.0	2.5
Honduras	2.0	2.2	2.2	2.2	2.2
Jamaica & Dep	2.0	1.5	2.0	2.0	2.0
Mexico	40.8	38.5	38.9	39.0	39.0
Nicaragua	0.2	0.2	0.2	0.2	0.2
Panama	0.5	0.5	0.5	0.5	0.5
Trinidad and Tobago	1.6	1.5	1.5	1.5	1.5
Other 2/	0.3	0.3	0.3	0.3	0.3
NO & CENT AMER & CARIBBEAN	108.1	115.4	100.0	105.0	104.5
Bolivia	2.5	2.5	2.5	2.5	2.5
Brazil	366.0	356.0	375.0	335.0	300.0
Colombia	56.0	58.0	60.0	61.5	61.5
Ecuador	87.4	102.0	100.0	80.0	100.0
Peru	10.0	10.0	10.0	10.0	10.0
Surinam	0.1	0.1	0.1	0.1	0.1
Venezuela	13.8	14.4	16.6	17.0	16.0
SOUTH AMERICA	535.8	543.0	564.2	506.1	490.1
Angola	0.2	0.2	0.2	0.2	0.2
Cameroon	122.4	122.0	110.0	95.0	110.0
Comoro Islands	0.1	0.1	0.1	0.1	0.1
Congo	1.2	1.0	1.0	1.0	1.0
Cote d' Ivoire 3/	734.5	710.0	820.0	725.0	710.0
Equatorial Guinea	7.4	7.5	7.5	7.5	7.5
Gabon	1.7	1.6	1.6	1.5	1.5
Ghana	260.8	295.0	293.0	280.0	240.0
Liberia	2.7	3.0	2.0	2.0	2.0
Madagascar	2.6	2.5	2.5	2.5	2.5
Nigeria 4/	144.0	155.0	160.0	165.0	110.0
Sao Tome and Principe	3.6	2.8	4.0	4.0	4.0
Sierra Leone	7.3	5.5	6.1	5.0	5.0
Tanzania	1.8	2.0	2.0	2.0	2.0
Togo 3/	10.2	6.5	7.0	8.0	6.0
Uganda	0.3	0.2	0.3	0.3	0.3
Zaire	4.9	5.0	4.0	5.0	4.0
AFRICA	1305.6	1319.9	1421.3	1304.1	1206.1
Fiji	0.3	0.3	0.3	0.3	0.3
India	6.0	6.0	6.0	6.0	6.0
Indonesia	93.8	120.0	130.0	130.0	150.0
Malaysia	218.8	240.0	235.0	245.0	245.0
Papua New Guinea	38.6	41.0	35.0	40.0	35.0
Philippines	7.9	9.0	9.0	9.0	9.0
Solomon Islands	3.2	3.8	4.7	4.0	5.0
Sri Lanka	1.5	1.5	1.5	1.5	1.5
Vanuatu/New Hebrides	1.5	2.2	2.0	2.0	2.0
Western Samoa	0.5	0.5	0.5	0.5	0.5
ASIA AND OCEANIA	372.2	424.3	424.0	438.3	454.3
WORLD	2321.7	2402.6	2509.5	2353.5	2255.0

1/ Estimates refer to an October-September crop year. 2/ Includes Belize, Dominica, St. Lucia, Guadeloupe, and Martinique.
3/ Includes some cocoa marketed from Ghana. 4/ Includes cocoa marketed through Benin.

MARCH 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

World cottonseed production for 1991/92 is estimated at a record 36.5 million tons, up 3.0 million or 9 percent from last year. Total foreign production is pegged at 30.3 million tons, up 2.3 million or 8 percent from 1990/91. Production was increased by a combination of improved yields in some major producing countries and a harvested area expected to reach a record 34.3 million hectares, up 4 percent over last year.

Cottonseed accounts for the world's second largest supply of oilseeds after soybeans. Yet it's output is a benevolent and valuable by-product of cotton lint production. Cottonseed processing and crush produces 47 percent meal and 16 percent oil by weight. Additional seed products include hulls (used as on-site fuel or fertilizer) and linters - a short fuzz on the seed that is valuable as an additive in the production of high-quality paper and plastics.

Cottonseed meal contains 81 percent of the protein level available in soybean meal, but feed use is limited by trace levels of substances toxic to livestock. These substances can be removed through processing techniques, but some major producing countries (such as China) lack this capability on a large scale, resulting in millions of tons of this meal product being used as fertilizer. Cottonseed oil for many developing countries is a significant source of edible cooking oil, in some instances the only vegetable oil domestically produced; thereby, reducing the pressure to spend scarce foreign currency supplies on additional edible oil imports.

Six major producing countries will produce an estimated 28.4 million tons or 81 percent of the world's cottonseed for 1991/92. Three of these producers lie in Asia. China, India, and Pakistan rank first, fourth, and fifth, respectively, for a total of 17.7 million tons or 49 percent of world output. Cotton production in these countries has climbed at a slow but steady pace. With a combined output of 11.9 million tons in 1986/87, their share of total world production was slightly less than 43 percent.

The republics of the former Soviet Union, rank as the world's third largest producer supplying an estimated 4.5 million tons. This is down 9 percent from last year and continues a downward trend since 1988/89 when cottonseed output totaled 5.6 million tons.

The United States produced an excellent cotton crop for 1991/92, with cottonseed output pegged at a record 6.1 million tons, up 13 percent from 1990/91. A near record harvested area of 5.2 million hectares and the second best yield in 5 years resulted in a new record cotton crop.

Other countries throughout the world are expected to harvest a combined total of 8.2 million tons of cottonseed in 1991/92, down 0.1 million or 2 percent from last year. Dry growing conditions reduced yields in significant producing countries such as Turkey, Australia, Egypt, and Paraguay. Israel, a relatively minor cottonseed producer, harvested an estimated 35,000 tons, down 58 percent from last year.

The February edition of the World Agricultural Production circular, FAS/USDA series WAP 2-92, published the annual preliminary forecast and situation review of world cotton area for 1992/93. Foreign cotton harvested area in 1992/93 is forecast to range between 27.0 to 29.0 million hectares. The upper estimate of 29.0 million hectares suggests an area similar to 1991/92 and implies that government policies in several major producing countries will support production in the face of lower cotton prices. At the low end, 27.0 million hectares, the forecast considers the affects of this season's lower prices together with the possibility of weather-related losses and financial problems. Using this forecast area and a 5-year weighted-average cottonseed yield of 0.97 metric tons per hectare, 1992/93 foreign cottonseed output could range between 26.2 and 28.1 million tons.

The first official USDA forecast of total 1992/93 foreign harvested area and production will be issued in May. Individual country estimates for area, yield, and production will be released in July of this year.

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TABLE 17

World Cottonseed Harvested Area by Country

	1986/87	1987/88	1988/89	1989/90	Prelim 1990/91	March 1991/92	1990/91 - 1991/92	
							Change	
							Amount	Percent
(1,000 hectares)								
India	6,948	6,471	7,343	7,331	7,355	7,265	-90	-1.2
China	4,306	4,844	5,534	5,203	5,588	6,350	762	13.6
United States	3,427	4,059	4,835	3,860	4,748	5,197	449	9.5
Former Soviet Union	3,475	3,527	3,432	3,333	3,171	3,010	-161	-5.1
Pakistan	2,505	2,568	2,508	2,598	2,693	2,776	83	3.1
Brazil	2,165	2,553	2,107	1,872	1,915	2,170	255	13.3
Argentina	330	515	501	570	630	630	0	0.0
Turkey	589	587	707	725	641	598	-43	-6.7
Paraguay	275	420	438	509	550	500	-50	-9.1
Tanzania	450	460	430	260	320	400	80	25.0
Egypt	443	416	425	422	417	390	-27	-6.5
Nigeria	285	320	370	380	370	380	10	2.7
Zimbabwe	243	272	248	229	250	275	25	10.0
Australia	148	247	194	240	270	268	-2	-0.7
Mexico	150	230	255	188	186	257	71	38.2
Colombia	175	234	218	188	260	253	-7	-2.7
Greece	205	211	252	278	282	230	-52	-18.4
Iran	188	196	191	228	229	204	-25	-10.9
Sudan	346	318	313	279	179	197	18	10.1
Mali	146	135	160	170	190	195	5	2.6
Chad	135	160	190	185	190	195	5	2.6
Cote d'Ivoire	159	180	213	201	199	192	-7	-3.5
Syria	144	129	171	158	156	190	34	21.8
Burkina	115	120	170	165	174	178	4	2.3
Burma	191	183	160	150	155	155	0	0.0
Kenya	138	138	140	140	140	140	0	0.0
Benin	100	80	97	110	121	124	3	2.5
South Africa	160	205	208	165	127	105	-22	-17.3
Cameroon	94	95	112	90	95	100	5	5.3
Peru	125	138	170	135	114	97	-17	-14.9
Mozambique	142	135	92	90	92	92	0	0.0
Zambia	32	58	91	67	95	85	-10	-10.5
Togo	55	60	70	75	80	82	2	2.5
Thailand	49	64	70	61	72	80	8	11.1
Spain	79	79	135	68	83	80	-3	-3.6
Central African Rep	80	75	65	63	70	65	-5	-7.1
Iraq	65	65	65	65	65	60	-5	-7.7
Afghanistan	69	40	45	55	60	60	0	0.0
Malawi	30	50	45	50	60	60	0	0.0
Ethiopia	55	55	55	55	55	55	0	0.0
Uganda	200	260	52	52	60	52	-8	-13.3
Angola	25	25	55	55	50	50	0	0.0
Nicaragua	65	59	34	35	50	45	-5	-10.0
Yemen	41	41	41	41	41	41	0	0.0
Senegal	25	29	39	24	36	36	0	0.0
Guatemala	31	40	40	40	36	36	0	0.0
Zaire	49	42	39	36	36	35	-1	-2.8
Venezuela	43	53	74	68	38	32	-6	-15.8
Ecuador	20	17	14	22	28	30	2	7.1
Albania	28	28	28	28	28	28	0	0.0
Madagascar	20	18	20	20	20	20	0	0.0
Bolivia	8	12	2	4	15	20	5	33.3
Indonesia	17	17	20	20	20	20	0	0.0
Bangladesh	13	12	17	17	17	18	1	5.9
Philippines	14	14	14	15	17	18	1	5.9
Vietnam	15	15	15	13	13	14	1	7.7
Haiti	13	13	13	13	13	13	0	0.0
Morocco	14	15	18	15	16	12	-4	-25.0
Somalia	12	12	11	12	12	12	0	0.0
Bulgaria	14	12	12	11	12	12	0	0.0
Israel	46	40	48	30	30	12	-18	-60.0
Niger	4	9	8	7	7	7	0	0.0
Korea, DPR	7	7	7	7	7	7	0	0.0
Cuba	4	4	4	4	4	4	0	0.0
El Salvador	13	14	13	10	6	4	-2	-33.3
Dominican Rep	3	5	3	3	3	3	0	0.0
Honduras	4	5	4	3	3	3	0	0.0
Yugoslavia	1	1	1	1	1	1	0	0.0
Italy	3	3	1	1	1	1	0	0.0
Costa Rica	1	1	1	1	1	1	0	0.0
Korea, Rep of	1	1	1	1	1	1	0	0.0
TOTAL	29,570	31,516	33,474	31,620	33,069	34,328	1,259	3.8

TABLE 18

World Cottonseed Yields by Country

	1986/87	1987/88	1988/89	1989/90	Prelim 1990/91	March 1991/92	1990/91 - 1991/92	
							Change	
							Amount	Percent
(metric tons per hectare)								
Israel	2.67	2.43	2.17	2.53	2.77	2.92	0.15	5.4
Australia	2.23	1.80	2.31	2.05	2.55	2.13	-0.42	-16.5
Madagascar	1.15	1.50	2.30	1.95	1.75	1.75	0.00	0.0
Syria	1.55	1.47	1.75	1.79	1.67	1.75	0.07	4.4
Pakistan	1.05	1.14	1.14	1.12	1.22	1.52	0.31	25.3
China	1.40	1.49	1.27	1.24	1.37	1.52	0.14	10.5
Mexico	1.62	1.61	2.42	1.78	1.83	1.50	-0.33	-17.8
Former Soviet Union	1.54	1.49	1.65	1.53	1.54	1.48	-0.06	-3.9
Egypt	1.46	1.35	1.15	1.27	1.37	1.40	0.03	2.0
Guatemala	1.32	1.80	1.55	1.53	1.64	1.39	-0.25	-15.3
Greece	1.60	1.42	1.59	1.49	1.21	1.35	0.14	11.8
Honduras	1.50	1.20	1.25	1.33	1.33	1.33	0.00	0.0
Afghanistan	1.45	2.00	1.78	0.73	1.67	1.33	-0.33	-20.0
Turkey	1.41	1.47	1.41	1.24	1.39	1.29	-0.10	-7.2
Morocco	1.29	1.47	1.06	1.27	1.13	1.25	0.13	11.1
Spain	1.62	1.58	1.33	1.44	1.41	1.25	-0.16	-11.3
Nicaragua	1.39	1.36	1.27	1.34	1.30	1.22	-0.08	-6.0
United States	1.01	1.29	1.14	1.10	1.14	1.18	0.04	3.5
Mali	1.06	1.10	1.17	1.08	1.05	1.15	0.10	9.6
Cameroon	1.19	1.10	1.26	1.11	1.16	1.13	-0.03	-2.4
Colombia	1.09	1.08	0.97	0.93	1.10	1.10	0.00	0.3
Peru	0.87	1.04	0.80	0.87	1.07	1.03	-0.04	-3.6
Italy	0.33	0.33	1.00	1.00	1.00	1.00	0.00	0.0
Costa Rica	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.0
El Salvador	1.15	1.07	1.00	1.00	1.00	1.00	0.00	0.0
Korea, Rep of	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.0
Yugoslavia	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.0
Dominican Rep	1.00	1.00	1.00	1.00	1.00	1.00	0.00	0.0
Sudan	1.01	0.92	0.95	0.98	1.07	0.96	-0.10	-9.7
Bangladesh	0.46	0.92	0.77	0.94	0.94	0.94	0.00	0.3
Venezuela	0.74	0.77	0.74	0.78	0.87	0.88	0.01	0.8
Ecuador	0.60	0.59	1.14	0.86	0.82	0.87	0.05	5.6
Togo	1.13	0.88	0.89	0.80	1.25	0.85	-0.40	-31.7
Ethiopia	0.78	0.78	0.78	0.78	0.78	0.78	0.00	0.0
South Africa	0.96	0.65	0.75	0.73	0.76	0.76	0.01	0.8
Paraguay	0.55	0.73	0.82	0.75	0.78	0.76	-0.02	-2.8
Bolivia	0.75	0.75	1.00	0.50	0.67	0.75	0.08	12.4
Iran	0.79	0.82	0.81	0.66	0.70	0.74	0.04	5.9
Argentina	0.59	0.91	0.64	0.77	0.78	0.73	-0.05	-6.2
Niger	0.50	0.89	0.75	0.57	0.57	0.71	0.14	25.0
Thailand	0.78	0.78	1.00	0.95	0.90	0.71	-0.19	-21.0
Yemen	0.71	0.71	0.71	0.71	0.71	0.71	0.00	0.0
Cote d'Ivoire	0.77	0.75	0.71	0.62	0.69	0.70	0.02	2.2
Burkina	1.04	0.94	0.64	0.59	0.64	0.67	0.03	4.7
Bulgaria	0.64	0.67	0.58	0.64	0.67	0.67	0.00	0.0
Brazil	0.50	0.61	0.57	0.62	0.61	0.65	0.04	7.0
Chad	0.49	0.58	0.56	0.48	0.61	0.61	0.00	0.0
Mozambique	0.25	0.22	0.62	0.60	0.61	0.60	-0.01	-1.8
Senegal	0.60	0.69	0.64	0.75	0.61	0.56	-0.05	-9.0
India	0.46	0.50	0.51	0.60	0.53	0.54	0.01	1.3
Benin	0.91	0.65	0.83	0.48	0.60	0.53	-0.06	-10.6
Zimbabwe	0.64	0.78	0.65	0.51	0.50	0.53	0.03	5.4
Malawi	0.40	0.44	0.36	0.40	0.50	0.50	0.00	0.0
Cuba	0.50	0.50	0.50	0.50	0.50	0.50	0.00	0.0
Philippines	0.71	0.57	0.57	0.53	0.47	0.44	-0.03	-5.7
Iraq	0.45	0.45	0.45	0.45	0.45	0.43	-0.01	-2.9
Burma	0.28	0.30	0.25	0.40	0.42	0.42	0.00	0.0
Zambia	0.44	0.72	0.33	0.25	0.44	0.41	-0.03	-6.8
Tanzania	0.30	0.34	0.29	0.35	0.38	0.38	0.00	0.0
Angola	0.36	0.36	0.46	0.46	0.36	0.36	0.00	0.0
Vietnam	0.27	0.27	0.27	0.31	0.31	0.36	0.05	15.9
Haiti	0.31	0.31	0.31	0.31	0.31	0.31	0.00	0.0
Indonesia	0.29	0.29	0.30	0.30	0.30	0.30	0.00	0.0
Uganda	0.12	0.15	0.35	0.29	0.25	0.29	0.04	15.2
Zaire	0.31	0.31	0.28	0.31	0.28	0.29	0.01	2.9
Korea, DPR	0.29	0.29	0.29	0.29	0.29	0.29	0.00	0.0
Nigeria	0.20	0.19	0.21	0.18	0.23	0.26	0.03	14.3
Central African Rep	0.24	0.20	0.34	0.27	0.26	0.26	0.01	1.9
Somalia	0.25	0.25	0.27	0.25	0.25	0.25	0.00	0.0
Albania	0.54	0.54	0.54	0.54	0.54	0.18	-0.36	-66.6
Kenya	0.11	0.11	0.13	0.12	0.12	0.12	0.00	0.0
SIMPLE AVERAGE	0.84	0.87	0.89	0.84	0.89	0.87	-0.02	-2.2

TABLE 19

World Cottonseed Production by Country

	1986/87	1987/88	1988/89	1989/90	Prelim 1990/91	March 1991/92	1990/91 - 1991/92	
							Change	
							Amount	Percent
(1,000 metric tons)								
China	6,018	7,217	7,053	6,440	7,665	9,624	1,959	25.6
United States	3,448	5,234	5,499	4,243	5,415	6,132	717	13.2
Former Soviet Union	5,352	5,255	5,648	5,106	4,880	4,451	-429	-8.8
Pakistan	2,638	2,935	2,851	2,910	3,271	4,224	953	29.1
India	3,218	3,202	3,712	4,400	3,900	3,900	0	0.0
Brazil	1,085	1,550	1,195	1,165	1,170	1,420	250	21.4
Turkey	829	860	1,000	900	890	770	-120	-13.5
Australia	330	445	449	493	689	571	-118	-17.1
Egypt	645	562	488	535	570	524	-46	-8.1
Argentina	193	467	318	440	490	460	-30	-6.1
Mexico	243	370	617	335	340	386	46	13.5
Paraguay	150	305	360	380	430	380	-50	-11.6
Syria	223	190	300	283	261	332	71	27.2
Greece	327	300	400	413	340	310	-30	-8.8
Colombia	190	253	212	175	285	278	-7	-2.5
Mali	155	148	187	184	200	225	25	12.5
Sudan	349	291	297	272	191	190	-1	-0.5
Iran	148	161	154	151	160	151	-9	-5.6
Tanzania	135	158	125	90	120	150	30	25.0
Zimbabwe	156	211	162	117	125	145	20	16.0
Cote d'Ivoire	123	135	151	124	137	135	-2	-1.5
Burkina	120	113	108	98	112	120	8	7.1
Chad	66	93	106	89	115	118	3	2.6
Cameroon	112	104	141	100	110	113	3	2.7
Spain	128	125	180	98	117	100	-17	-14.5
Peru	109	143	136	118	122	100	-22	-18.0
Nigeria	56	60	79	70	85	100	15	17.6
Afghanistan	100	80	80	40	100	80	-20	-20.0
South Africa	154	134	155	120	96	80	-16	-16.7
Togo	62	53	62	60	100	70	-30	-30.0
Benin	91	52	80	53	72	66	-6	-8.3
Burma	54	54	40	60	65	65	0	0.0
Thailand	38	50	70	58	65	57	-8	-12.3
Mozambique	35	30	57	54	56	55	-1	-1.8
Nicaragua	90	80	43	47	65	55	-10	-15.4
Guatemala	41	72	62	61	59	50	-9	-15.3
Ethiopia	43	43	43	43	43	43	0	0.0
Madagascar	23	27	46	39	35	35	0	0.0
Israel	123	97	104	76	83	35	-48	-57.8
Zambia	14	42	30	17	42	35	-7	-16.7
Malawi	12	22	16	20	30	30	0	0.0
Yemen	29	29	29	29	29	29	0	0.0
Venezuela	32	41	55	53	33	28	-5	-15.2
Iraq	29	29	29	29	29	26	-3	-10.3
Ecuador	12	10	16	19	23	26	3	13.0
Senegal	15	20	25	18	22	20	-2	-9.1
Angola	9	9	25	25	18	18	0	0.0
Bangladesh	6	11	13	16	16	17	1	6.3
Kenya	15	15	18	17	17	17	0	0.0
Central African Rep	19	15	22	17	18	17	-1	-5.6
Bolivia	6	9	2	2	10	15	5	50.0
Uganda	24	38	18	15	15	15	0	0.0
Morocco	18	22	19	19	18	15	-3	-16.7
Zaire	15	13	11	11	10	10	0	0.0
Bulgaria	9	8	7	7	8	8	0	0.0
Philippines	10	8	8	8	8	8	0	0.0
Indonesia	5	5	6	6	6	6	0	0.0
Vietnam	4	4	4	4	4	5	1	25.0
Albania	15	15	15	15	15	5	-10	-66.7
Niger	2	8	6	4	4	5	1	25.0
Haiti	4	4	4	4	4	4	0	0.0
El Salvador	15	15	13	10	6	4	-2	-33.3
Honduras	6	6	5	4	4	4	0	0.0
Dominican Rep	3	5	3	3	3	3	0	0.0
Somalia	3	3	3	3	3	3	0	0.0
Cuba	2	2	2	2	2	2	0	0.0
Korea, DPR	2	2	2	2	2	2	0	0.0
Costa Rica	1	1	1	1	1	1	0	0.0
Yugoslavia	1	1	1	1	1	1	0	0.0
Italy	1	1	1	1	1	1	0	0.0
Korea, Rep of	1	1	1	1	1	1	0	0.0
TOTAL	27,739	32,073	33,180	30,823	33,432	36,481	3,049	9.1

Wheat production in India has risen sharply in the past 20 years following the advent of the "green revolution" in the late 1960's. Wheat output grew by 170 percent, from approximately 20.1 million tons in 1970/71 to 54.5 million in 1991/92. Wheat area expanded at a gradual pace during the same two decades, growing from 16.6 million hectares in 1970/71 to 24.0 million in 1991/92, or an increase of 54 percent. While wheat area has hovered between 22.0 and 24.0 million hectares for the last 10 years, yields continue to exhibit strong growth. Wheat yields have increased 55 percent in the past 10 years and by 84 percent during the last 20 years. Currently, the 1991/92 wheat crop is estimated by USDA at a record 54.5 million tons, up 1 percent from the previous record in 1989/90. The 1991/92 crop was harvested in the spring of 1991. USDA's first production estimate for the 1992/93 crop, which will be harvested in April of 1992, will be released in May.

The potential for continued growth in wheat output in India will depend largely on factors which affect crop yield. These are primarily price incentives, irrigation supplies, fertilizer prices, and the general management practices of growers. The price differential between wheat and competing crops will largely affect the rates at which crop inputs are applied and effort growers expend managing the crop. During the current 1992/93 growing season, wheat prices have been less attractive compared to the returns for rapeseed, the dominant winter oilseed crop. However, a shortage of wheat in the domestic market, rumored to be the result of hoarding, have held wheat prices at levels which should discourage large reductions in harvested area.

BACKGROUND

Wheat is the most important winter cereal grown in India and ranks second only to rice in terms of overall production. It is cultivated during the winter-dry season (October to May) in the northern half of the subcontinent. Rainfall during this period averages between 1 and 3 inches. Cropping intensity is heaviest in the irrigated northwest sector of the wheat belt, namely in Punjab, Haryana, northeast Rajasthan, and western Uttar Pradesh. This region has been the focus of "green revolution" productivity developments in both wheat and rice and is considered the breadbasket of the country. Surplus grain production occurs primarily in this sector, providing supplies for government procurement and the open market. Nearly all of government purchases for buffer stocks come from these growing areas. Wheat is also cultivated in a less intensive fashion in other northern and central Indian States, namely Bihar, West Bengal, Madhya Pradesh, Gujarat, Karnataka, and Maharashtra.

Irrigation has played a critical role in the growth of wheat production in India, forming the foundation for productivity advances and national foodgrain self-sufficiency. Assured water supplies in the prime northwest growing areas enabled a huge expansion of improved high-yield variety (HYV) seed usage in the years following their introduction. The HYV wheat seeds are less drought tolerant than traditional Indian varieties, requiring a higher level of both moisture and fertilizer to achieve their potential yield. The expansion of high-yielding wheat varieties began in 1966/67 soon after the introduction of dwarf wheats from Mexico. In the 5 years between 1966/67 and 1970/71, HYV

wheat area quickly grew from 500,000 hectares to 6.5 million, an increase of 1,200 percent. Over the following 20 years, HYV area grew to 22.0 million hectares, or 83 percent of total wheat area by 1988/89. This represents a 238-percent increase over 1970/71 levels, and a 4,300-percent increase over 1966/67. Finally, the stable irrigated growing environment allowed Indian farmers to increase their traditional cropping intensity to 300-400 percent by adding wheat to their rotation. The higher crop intensity eventually led to grain surpluses and the achievement of national self-sufficiency.

Varietal research in India led to the adoption of wheat cultivars unlike those introduced from Mexico. The Mexican dwarf varieties did not meet Indian consumer requirements owing to their red color, sticky dough, and easy spoilage in prepared bread products. The primary varieties grown in India are ideal for making unleavened "tortilla-like" flat breads called "chapati", which are the main form of wheat consumption in India. Indian wheats typically average between 9-16 percent protein. Bread wheats form the bulk of the Indian wheat crop, while small amounts of both durum and emmer wheat are also cultivated. Bread wheats are grown over most of the wheat belt, but are concentrated in the northern Gangetic Plain stretching from Punjab in the west to West Bengal in the east. Durum wheat is cultivated most commonly on the black soils of central India, while emmer wheat is planted to a limited extent in central and south India. In 1989, the Fertilizer Association of India estimated that bread wheats made up approximately 87 percent of the national crop, durum 12 percent, and emmer wheat 1 percent.

CULTIVATION PRACTICES

Wheat is cultivated throughout India in either a rainfed or irrigated cropping regime. Irrigated wheat is normally sown in November following the harvest of summer grown rice, cotton, corn, sorghum, millet, sugarcane, or pulses. It is concentrated in the breadbasket States of Punjab, Haryana, Rajasthan, and Uttar Pradesh. Irrigated wheat is also of particular importance in the northeastern States of Bihar, West Bengal, and Orissa. High-yield varieties predominate on irrigated land, while field preparation is carried out by both tractor and animal traction. Mechanization of cultivation, planting, and harvesting operations is expanding in northwest India, but is overshadowed in the majority of states by animal power. Wheat is grown predominantly as a mono-crop or is inter-cropped with rapeseed. Fertilizer applications are highest on irrigated acreage, as is crop response to these costly inputs. The growing season averages 150-160 days in the northwest states, and 120-140 days in the northeast. The soils are primarily deep alluvium; light in texture, organic matter, and water holding capacity. These soils are excellent for irrigated cultivation.

Rainfed wheat is concentrated in the central Indian States of Madhya Pradesh, Maharashtra, and Karnataka. Lesser amounts are grown in the remainder of the wheat belt, averaging between 3-28 percent of total wheat area. The rainfed cropping areas experience wide fluctuations in productivity, owing to their reliance on stored soil moisture and light winter showers. Field cultivation is an important and recurring necessity for rainfed wheat to suppress weed growth and conserve soil moisture. Fertilizer applications are light to nonexistent, while short season drought resistant varieties predominate. Relatively high temperatures are common during the growing season which averages between 110-140 days. The soils are varied, ranging from light to heavy textures. The darker soils are heavy with good water holding capacity, and can produce a moderately good wheat stand under rainfed conditions. As with the irrigated crop, rainfed wheat is grown as a part of a regional crop

rotation. The particular rotation varies with average rainfall, but can include soybeans, cotton, millet, corn, rice, peanut, and pulses. Intercropping or mixed cropping of wheat with winter oilseeds or pulses is also common.

CROP YIELD

The general stability of the Indian grain economy in recent years is in large part the result of the continuing success of the country's "wheat revolution." The national transition of a drought-plagued foodgrain importing nation, to one largely sufficient in domestic production has been widely acknowledged. The constant growth of wheat productivity in India has helped fuel this prosperity. Wheat yields have exhibited remarkably stable growth over time, especially considering the many economic, infrastructural, and developmental problems that exist in rural India. Since 1970/71, the steady increase of annual productivity has been accomplished through gradual advances in key crop input sectors. Irrigated wheat area expanded to 18.5 million hectares in 1988/89 (77.3 percent of total area), up from 9.9 million (54.3 percent) in 1970/71. Wheat area sown with HYV seed reached 22.0 million hectares in 1988/89, up 238 percent from the 1970/71 level of 6.5 million hectares. Overall fertilizer consumption in India increased by 382 percent during this period, while pesticide consumption grew by 248 percent. Finally, the availability of certified wheat seed increased by 74 percent, rising from 109,400 tons in 1983/84 to 190,000 in 1987/88. The persistent evolution of these key input sectors has enabled Indian wheat yields to grow at an annual rate of 4.3 percent for the past 20 years. It is apparent that, given future growth in these sectors, additional productivity improvements may be expected.

Indian Wheat: Area, Yield and Production

	AREA (Million Ha)	YIELD (MT/Ha)	PRODUCTION (Million tons)
1980/81	22.2	1.44	31.8
1981/82	22.3	1.63	36.3
1982/83	22.1	1.69	37.5
1983/84	23.6	1.82	42.8
1984/85	24.7	1.84	45.5
1985/86	23.6	1.87	44.1
1986/87	23.0	2.05	47.1
1987/88	23.1	1.92	44.3
1988/89	23.1	2.00	46.2
1989/90	24.1	2.24	54.1
1990/91	23.5	2.12	49.9
1991/92	24.0	2.27	54.5

Michael J. Shean (202) 690-0135

CHART 1

INDIA: Wheat Area and Production

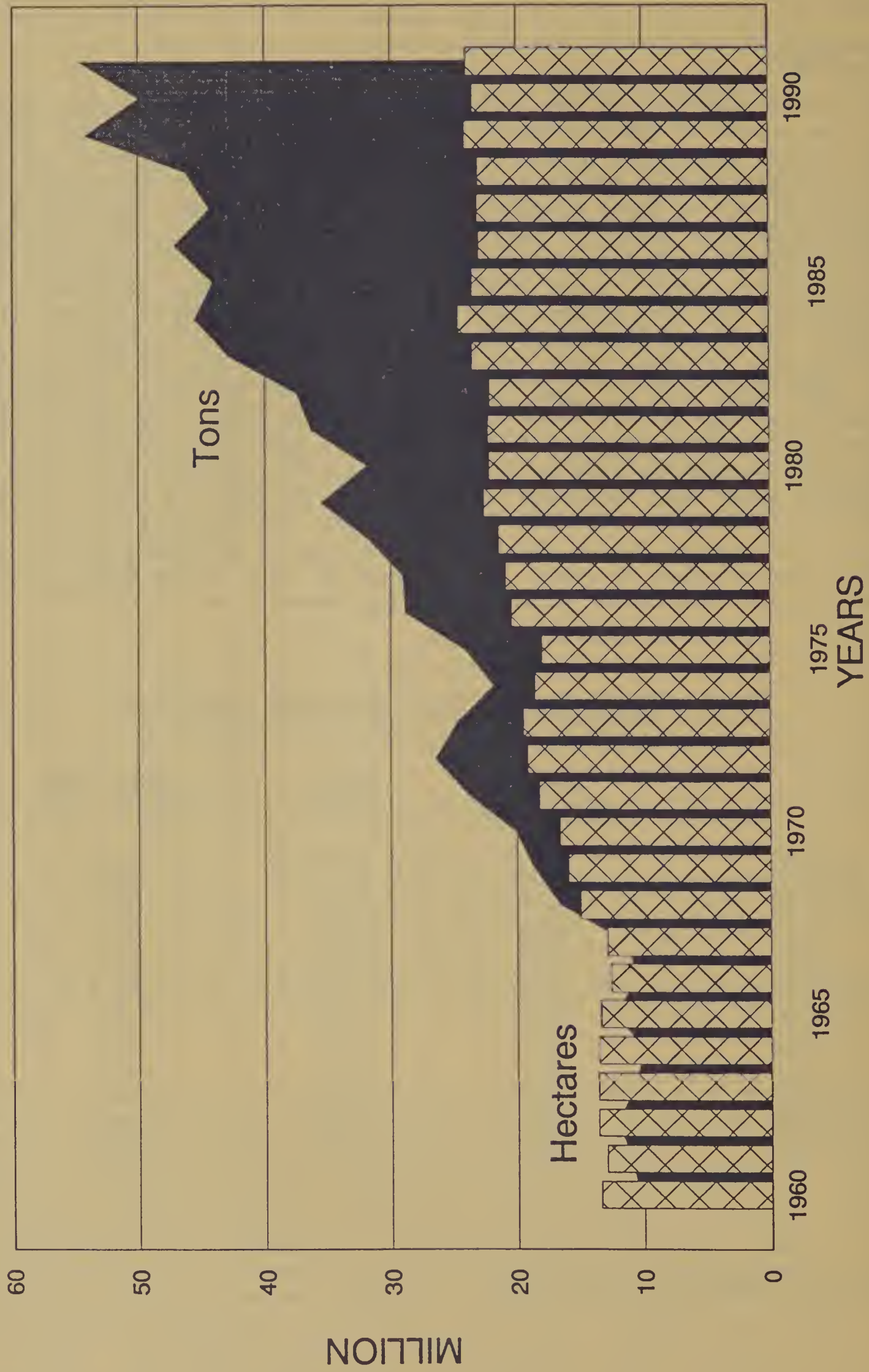


CHART 2

INDIA: Wheat Yield

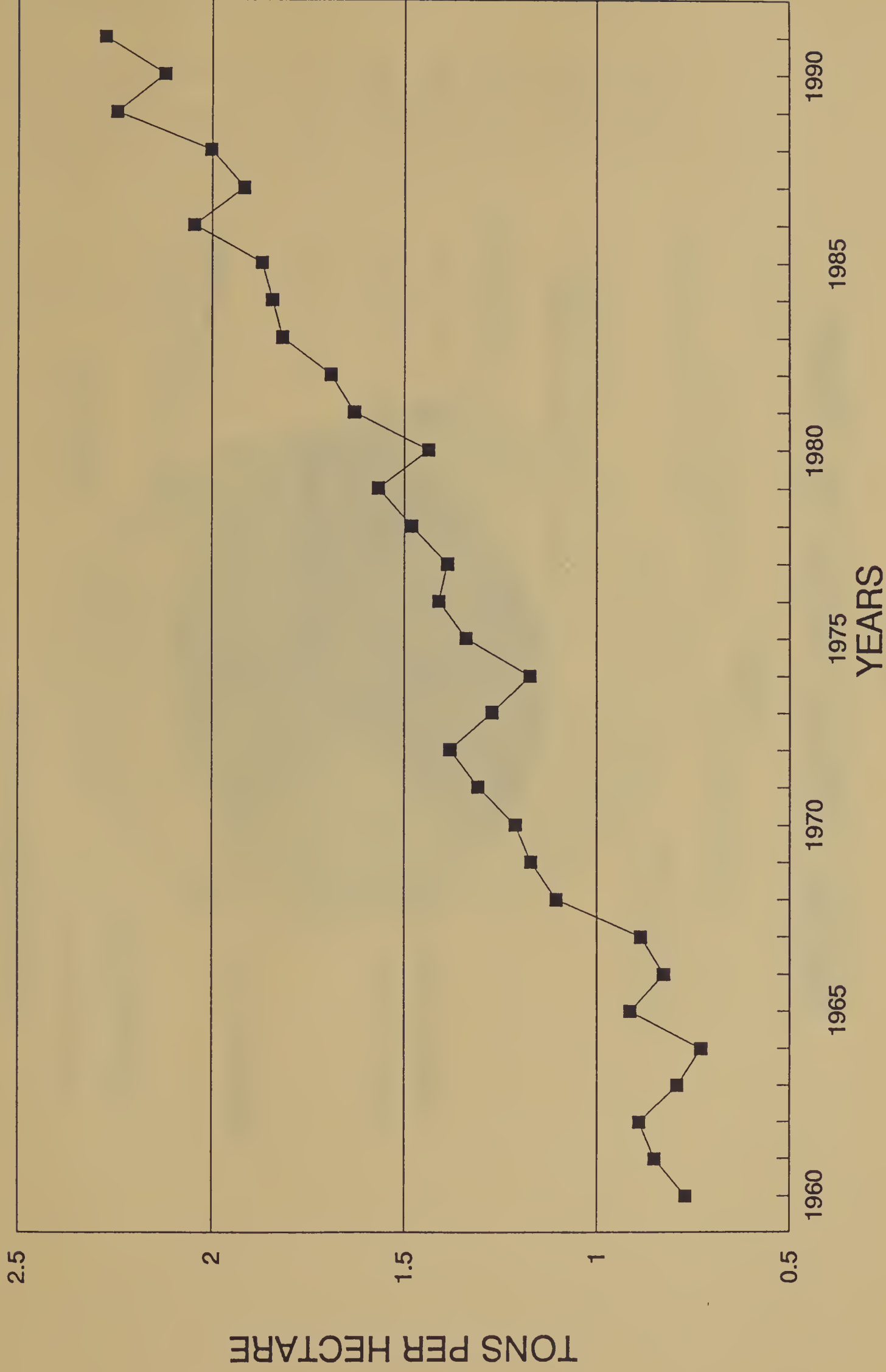


CHART 3

INDIA: Wheat Area by State (1989)

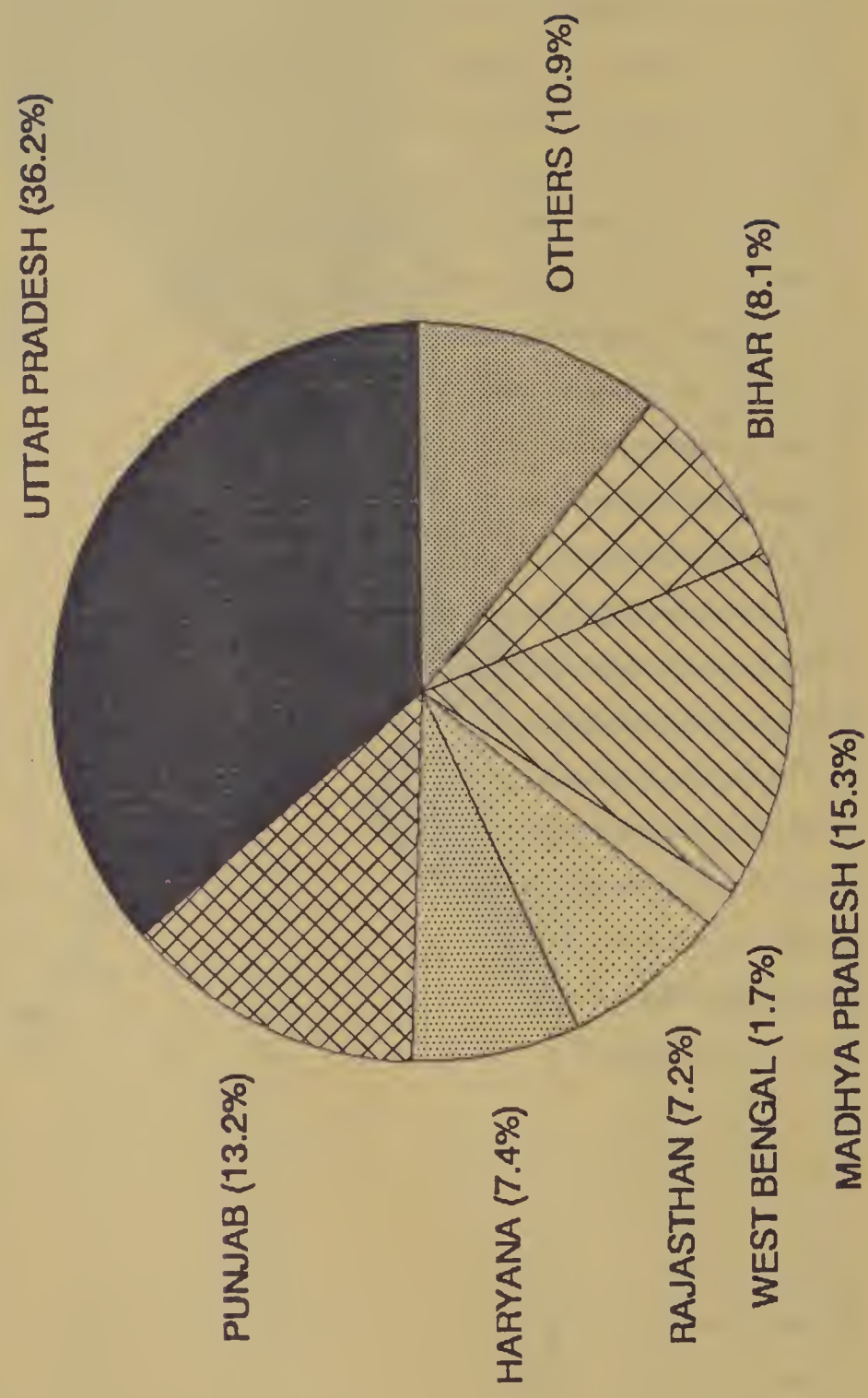
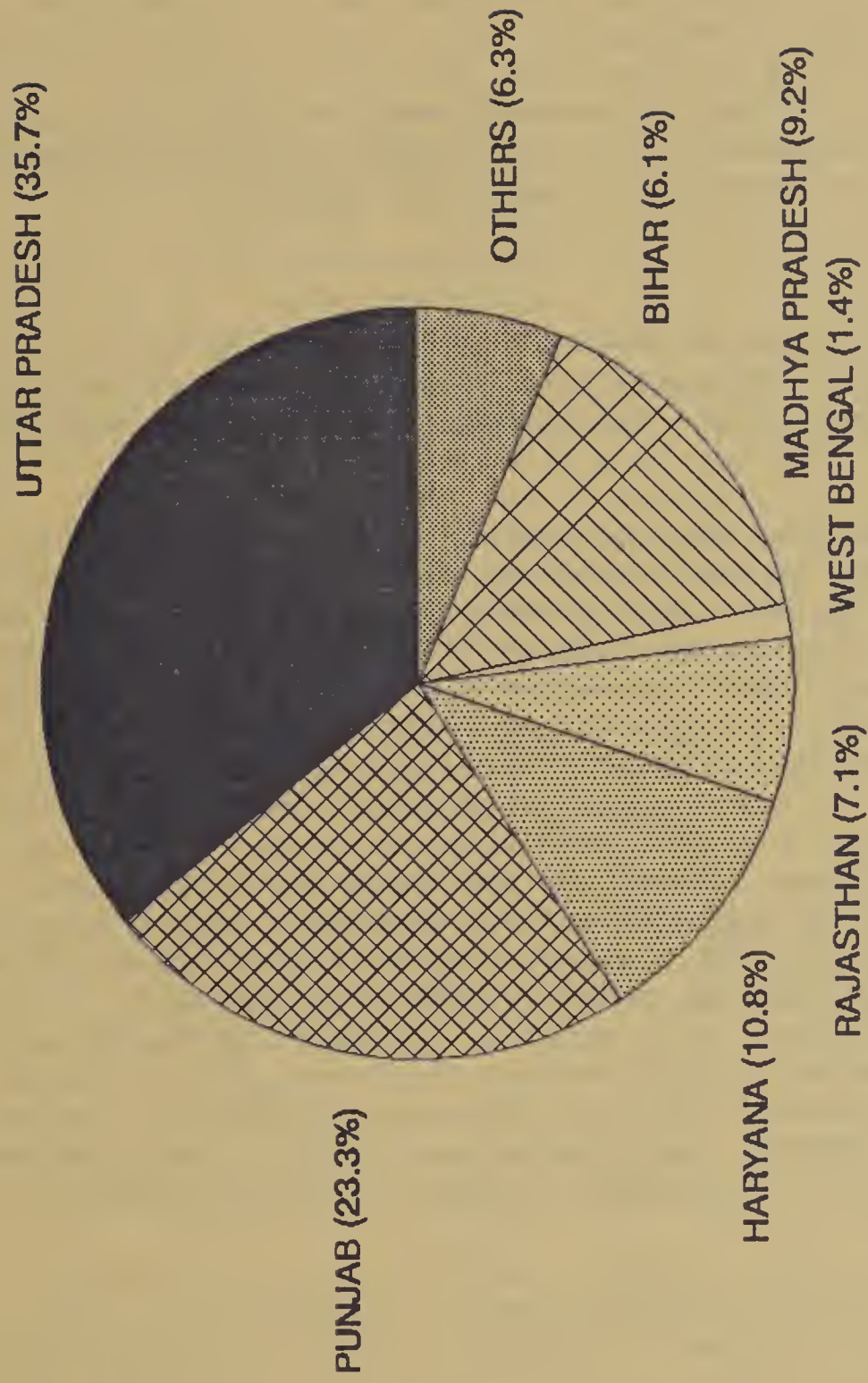


CHART 4

INDIA: Wheat Production by State (1989)



BRAZILIAN AND ARGENTINE SOYBEANS

Foreign Agriculture Service personnel traveled through the major soybean regions of Brazil and Argentina during February 1992. The condition of Brazilian soybeans was assessed in the States of Parana, Sao Paulo, Goias, and Mato Grosso. Brazilian soybean production is expected to increase to 18.5 million tons, up 2.7 million from last year's drought reduced level. The Center-West States are expecting above-average yields as are most of the southern states which received near normal precipitation. However, drought in Parana State and southern Mato Gross do Sul will dampen a complete recovery in production. In Argentina, the condition of soybeans was assessed in Buenos Aires and Santa Fe Provinces. Crops were in mixed condition, and production is estimated at 10.5 million tons, down 1.0 million from last year's record level due to lower yields. This assessment is supported by satellite image analysis indicating recovery in Brazil and less intense crop vegetation in Argentina. More specific comments for each country follow.

BRAZIL

Soybean production is forecast at 18.5 million tons for the 1991/92 crop, up 2.7 million or 17 percent from 1990/91, due to slightly higher area and above-average yields. Two distinct regions were assessed and each differed greatly.

In the Center-West region, soybean production has benefited from planting incentives due to the timely release of credit and favorable weather throughout the growing season. During February, soybeans were in the pod-set to pod-fill stages. Vegetation was lush and over a meter high indicating good applications of fertilizer, lime, and herbicides. Apparently, the two releases of credit allowed farmers to meet planting goals and then use additional credit to boost input applications. Record yields are expected in Mato Grosso and Goias, which represent 24 percent of harvested area. Some root rot disease was noticed in Goias, but this will not significantly affect production. In Mato Grosso, soybeans dominate the economy and there is little emphasis on other field crops. However, soybeans provide cash only once a year, and farmers are beginning to look for a second crop to augment their income. Possibilities include winter cotton to double crop with soybeans. If an early maturing variety of soybeans were planted, and could be harvested in February, cotton could be planted in late February and harvested during Mato Grosso's dry winter. This would reduce yields for soybeans but provide two sources of income for farmers. Ample area remains for soybean expansion, but this will occur only if the government can continue its current credit policy.

In contrast to the excellent conditions in the Center-West, areas of Parana and Sao Paulo were experiencing four to six weeks of drought during the flowering and pod-setting stages. Soybeans in this area demonstrated signs of drought stress; i.e., vertical leaves and diminutive plants. Some soybeans were in the pod-filling stage earlier than expected due to an accelerated crop calendar induced by drought. Scattered showers in late February brought some relief; however, yields are expected to be below normal. Parana and Sao Paulo account for 23 percent of harvested area. Soybeans in this area are included in a complicated crop rotation pattern and compete for land and resources with cotton, corn, pasture, coffee, and sugar cane. Area expansion hinges on price relationships between these competing commodities. Soybeans in this area decreased from 1990/91 levels.

Markets for soybeans include crushers in the interior, port-based crushers, and exporters. Recent state government initiatives of tax deferments have spurred increased crushing capacity in the Center-West region. However, markets for the soy products remain either in the South or for export through the southern ports. The soybean business relies on a deteriorating network of roads, with estimates of freight costs ranging between US\$50 and \$70 per ton. While soybean profitability depends on international prices, the lack of a reliable, safe, and inexpensive transportation network will continue to diminish soybean profits in Brazil.

ARGENTINA

Soybean production is forecast at 10.5 million tons for the 1991/92 crop, unchanged from last month, but down 1.0 million tons or 9 percent from last year's record. Area is unchanged from last year, but yields are not expected to reach the near-record levels of 1990/91. The important soybean areas of southern Santa Fe and northern Buenos Aires Provinces were traveled in late February. A wide variety of plant stages was evident. Early season dryness aided soil preparation and planting; however, heavy rains in December and early January caused significant delays (nearly 30 days in some areas). The rains affected the planting of second crop soybeans (following wheat) as well as part of the early season varieties. Planting and replanting of soybeans continued into late January. First crop soybeans account for 71 percent of the area, similar to 1989/90, but more than last year's 64 percent. Estimates of first crop beans, delayed by the rains, range between 10 and 23 percent. Thus, between 36 to 45 percent of the total crop was planted late. The later planted soybeans that were observed differed in stage of development. Most were in full flower, but some were still in the vegetative stage. Some fields were planted so late that the plants were just knee-high and had not fully filled in between the rows. These soybeans will not have as good yields as early season varieties, and are dependent on weather in March and April.

Crushing capacity is increasing in Argentina, both at the ports and in the Provinces. Decisions about where to locate facilities are made based on market forces, unlike in Brazil where tax incentives play a major role. In Argentina there is a 6-percent export tax on whole soybeans. This tax encourages crushing soybeans and exporting the products.

Soybean expansion in Argentina depends on profitability relative to competing crops. Corn is more profitable when planted on rich soils. However, one study in northern Buenos Aires showed soybeans are the most profitable, followed by sorghum, sunflower, and corn.

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Soybean Yields in Argentina and Brazil

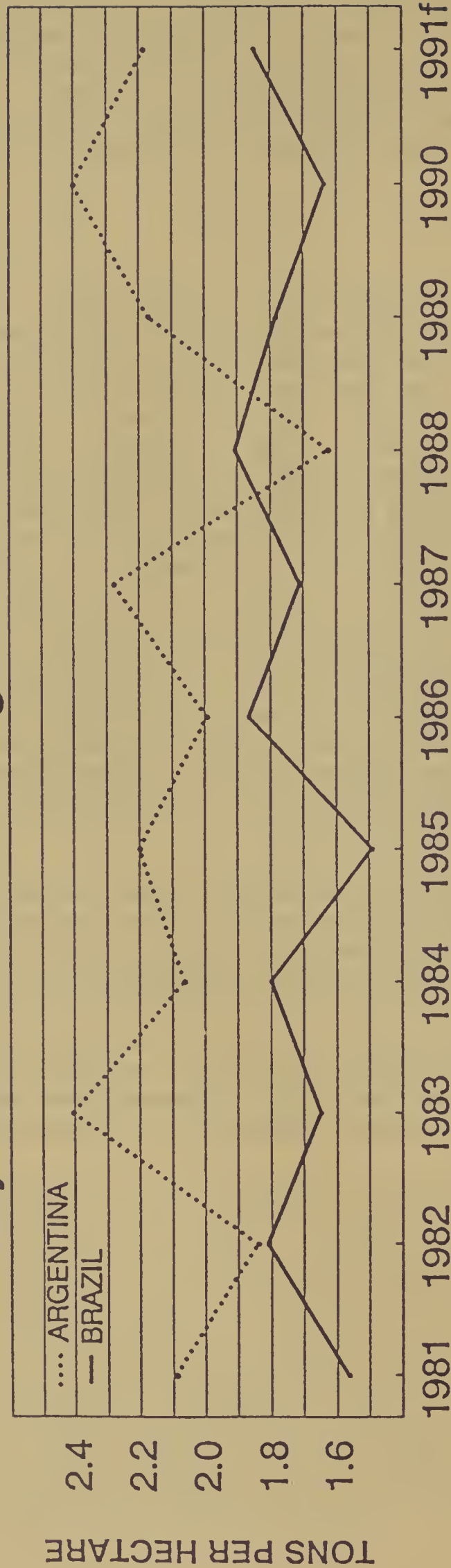


TABLE 20

Soybean Area, Yield, and Production

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991f
AREA HARVESTED (1000 hectares)											
Brazil	8,202	8,136	9,421	10,153	9,450	9,270	10,524	12,170	11,400	9,650	10,000
Argentina	1,986	2,281	2,910	3,270	3,316	3,510	4,260	4,000	4,950	4,800	4,800
YIELD (metric tons per hectare)											
Brazil	1.57	1.81	1.65	1.80	1.49	1.87	1.71	1.91	1.78	1.64	1.85
Argentina	2.09	1.84	2.41	2.06	2.20	1.99	2.28	1.63	2.17	2.40	2.19
PRODUCTION (1000 metric tons)											
Brazil	12,835	14,750	15,541	18,278	14,100	17,300	18,021	23,200	20,340	15,800	18,500
Argentina	4,150	4,200	7,000	6,750	7,300	7,000	9,700	6,500	10,750	11,500	10,500

Note: Date refers to the first year of marketing year; e.g., 1990=1990/91, 1991f is forecast.

MARCH 1992

Production Estimates and Crop Assessment Division, FAS, USDA

Reports from southern Africa indicate that a severe drought and reduced coarse grain production will cause regional food shortages in 1992. Scant rainfall and above-normal temperatures since mid-December have led to one of the worst droughts in many years in South Africa, Zimbabwe, Zambia, Botswana, Swaziland, Lesotho, Mozambique, Malawi, and Namibia. Production prospects for the 1991/92 coarse grain crops are poor in all the affected countries. South Africa and Zimbabwe normally have surplus corn to export to their neighbors, but this year the two countries are among the most badly hurt by the drought. Increased imports of corn and other grains will be needed to help compensate for the drop in regional grain production.

WEATHER TRENDS

Weather conditions were generally favorable until mid-December for the 1991/92 southern Africa coarse grain crop, which was planted in October through December 1991. Harvest will begin in April 1992. South Africa had adequate soil moisture for planting and early crop development, although cumulative rainfall in northern parts of the Maize Triangle was below normal and soil moisture levels were slowly declining. Newly-planted crops benefited from late but timely rainfall in Zimbabwe and Zambia, while widespread rain favored the planting of grain crops in Namibia, Lesotho, Botswana, and Swaziland. Mozambique and Malawi were dry during the early part of the planting season, but moderate rainfall in December improved moisture conditions for emerging crops. At the end of the year, all of the countries in the region were expecting average to above-average 1991/92 coarse grain production.

Production prospects across southern Africa took a sharp turn for the worse in January as the weather turned unusually hot and dry. Between January 1 and February 29, temperatures averaged 2 to 4 degrees Celsius above normal nearly everywhere in the region and rainfall dropped off drastically. The corn producing region of Zimbabwe and the western Maize Triangle in South Africa received less than 50 percent of normal rainfall during the period, and only the south and west coast of South Africa and isolated locations in the Transvaal, Zambia, and Mozambique received near-normal rainfall. Scattered showers in the middle of February brought some relief to Lesotho, eastern South Africa, and portions of Zimbabwe, but moisture conditions worsened elsewhere. By the end of February the drought had expanded deep into Zambia, Botswana, Mozambique, and southern Malawi.

SOUTH AFRICA

The severe drought now gripping South Africa will have a serious impact on the 1992 and 1993 food supply and may cause long-term damage to the South African economy. After a good start to the growing season, the 1991/92 coarse grain crop began to show signs of stress in early January. At that time, the South African Maize Board unofficially estimated 1991/92 corn production at 7.5 to 8.0 million tons, down from a pre-season estimate of 8.5 million tons. As the drought intensified, especially in northern Orange Free State and western Transvaal, the Board lowered its estimate significantly. By the end of February, the National Association of Maize Producers (NAMPO), the Ministry of Agriculture, and the Maize Board had reduced their unofficial corn production estimates to less than 3.0 million tons, the smallest crop in 50 years. The USDA March 1991/92 corn production estimate is 4.5 million tons, down 3.7 million or 45 percent from last year and the smallest crop since the drought year of 1983/84. Cotton, sorghum, sunflowerseed, peanut, and soybean crops have also suffered from the drought, though the final impact on these crops has not yet been determined.

South African officials are very concerned about the economic and social effects of the current drought. According to recent reports from the U.S. agricultural attache in Pretoria, economic losses to farmers and farm communities are already in the hundreds of millions of dollars and could increase significantly if the drought lasts the rest of the growing season. According to NAMPO, nearly 25 percent of South Africa's 12,000 commercial grain farmers are in financial trouble, and many may be forced into bankruptcy. In addition, between 500,000 and 750,000 subsistence farmers have had their crops destroyed by the drought and food shortages could affect millions of South Africans. The drought will force South Africa to switch from being a corn exporter to a corn importer for the 1992/93 marketing year.

ZIMBABWE

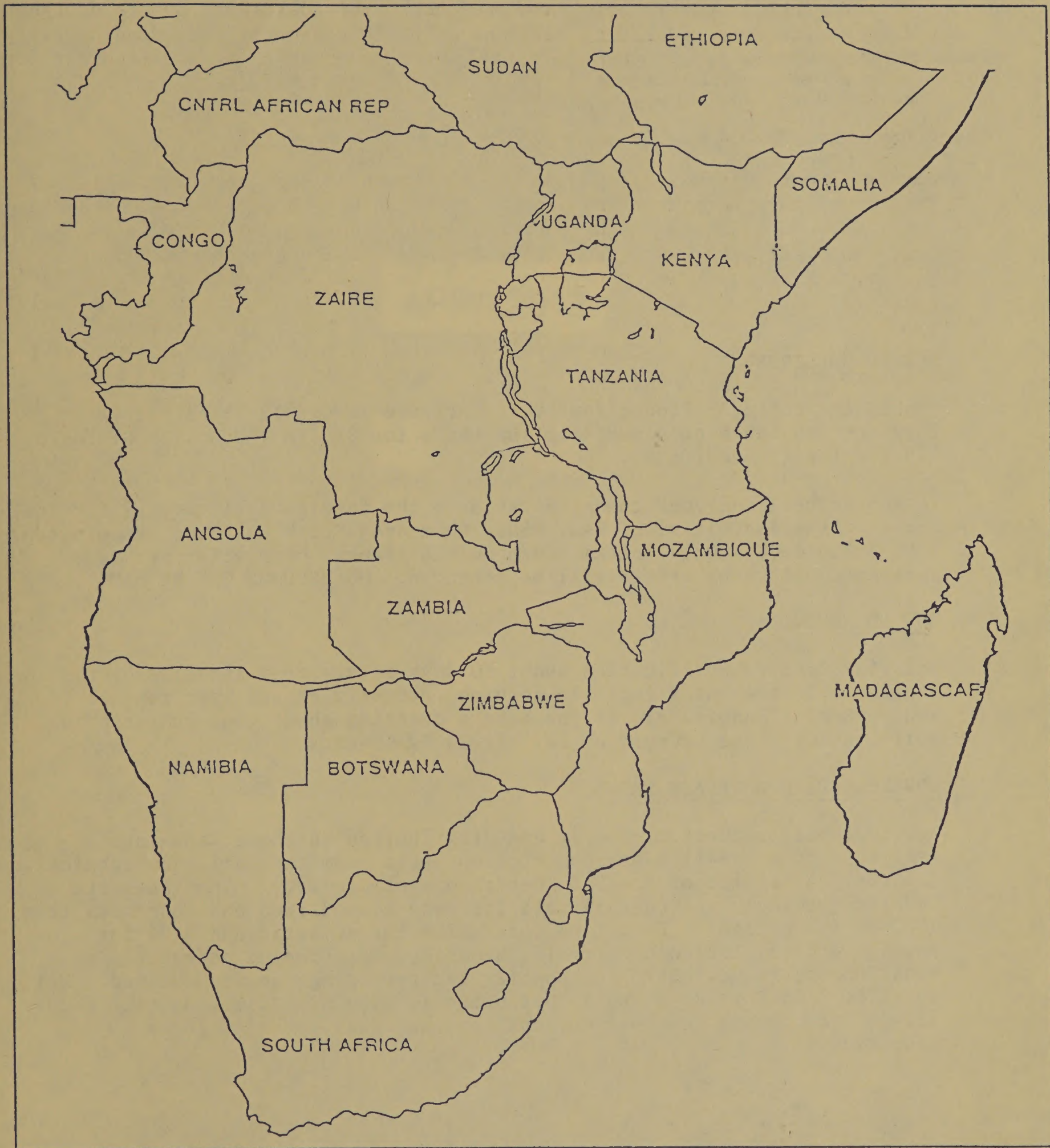
Zimbabwe is reportedly suffering from one of the worst droughts in its history. Extremely high temperatures and minimal rainfall have been recorded over the country for the last two months. Drought conditions are most severe in the south, southwest, and eastern parts of Zimbabwe, where grazing is the most important agricultural activity, but the primary grain-production region in northern Zimbabwe was also hit hard by the drought. According to unofficial estimates, the 1991/92 corn crop could be 60 to 70 percent below normal on commercial farms and more than 80 percent below normal in communal areas. The USDA March 1991/92 corn production estimate is 1.0 million tons, down 0.6 million or 38 percent from last year's poor crop. Oilseeds, cotton, and sugar crops were also affected by the drought, and large numbers of cattle in the south are reportedly dying. The Zimbabwe Government recently doubled the government purchase price for corn in an effort to stimulate production and increase procurement, but given this year's production shortfall, the Government estimates that large amounts of corn, wheat, and rice will have to be imported in the next 15 months to meet the domestic demand for grain. Citing the life-threatening situation in rural areas for humans and livestock, the Government of Zimbabwe recently declared a drought emergency and requested food assistance from international donors.

ZAMBIA

The drought had an unexpectedly severe impact on Zambia. Expectations for Zambia's 1991/92 corn crop were very high early in the season. A sizable increase in planted area resulted from a rise in the government purchase price and favorable rainfall was received during the planting season. Officials predicted the crop would be much larger than last year and the largest crop in 10 years. Production prospects declined in January due to unfavorably hot and dry weather, but Zambian officials were still predicting an average crop as of mid-February. The drought intensified in southern Zambia's major corn producing areas just as the crop entered the critical tasseling stage and the crop deteriorated rapidly. The USDA March 1991/92 corn production estimate is 1.0 million tons, down slightly from last year's below-average harvest and down 250,000 tons from the pre-season estimate. The Zambian Government has declared a drought emergency and is taking measures to minimize the impact of the drought on the country's ongoing economic reform program.

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SOUTHERN AFRICA



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